Statistical Review of Northern Ireland Agriculture 2013

Department of
Agriculture and
Rural Development
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Talmhaíochta agus
Forbartha Tuaithe

MÄNNYSTRIE O
Fairms an
Kintra Fordèrin

POLICY AND ECONOMICS DIVISION

Statistical Review of Northern Ireland Agriculture

2013

Agriculture, Fishing & Forestry

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A National Statistics publication

Statistical Review of Northern Ireland Agriculture 2013

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 published annually and contains a wide range of statistics on the agricultural industry. It is an important reference document for agri-food sector stakeholders and policy makers.

The data contained in the *Statistical Review* are derived mainly from farm surveys, including the Agricultural Census and the Farm Business Survey, and surveys of food processing and agricultural input supply firms. These surveys are carried out in order to enable the Department of Agriculture and Rural Development (DARD) to meet the legislative requirements with which it is charged.

The *Statistical Review* is a Departmental publication and in line with the guidance for these publications, DARD provides a number of hardcopies to designated public libraries, local political parties and the NI Assembly Government. Normally, after these requirements have been satisfied a small number of hardcopies become available and these are distributed free of charge on a first come first served basis while stocks last - please contact the Editor at the address below. As with all DARD statistical publications, the *Statistical Review* is available in electronic format, free of charge, on the DARD website, at www.dardni.gov.uk. This website also contains long-term trend data for a selection of Statistical Review tables. New statistical releases appearing on the DARD website are announced on the DARD Twitter account: @DARDstats. Some of these statistical publications and statistical notices may also be obtained in hard copy form on request from Policy and Economics Division. 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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KEY FACTS 2013

	NI	UK	ROI	EU15
GROSS VALUE ADDED (GVA)				
Agriculture as % of total GVA	1.5[P]	0.6[1]	2.4[1]	1.6[2]
EMPLOYMENT				
Agricultural employment (‘000)	27	340	111	5,037
As % of total civil employment	3.5	1.2	5.8	2.9
LAND USE				
Agricultural area (‘000 ha)	998	17,259	4,533[1]	155,766[3]
As % of total area	73.9	70.7	64.5[1]	46.3[3]
LESS FAVOURED AREAS (LFA)				
LFA as % of agricultural area	70.2	47.5[1]	75.0[3]	60.6[3]
FARMS				
Number (‘000)	24.5	222.0[1]	140[2]	5,608[3]
Average agricultural area (ha)	40.7	77.3[1]	32.7[2]	27.8[3]
ENTERPRISES				
Average enterprise size:				
Dairy cows	82	84[1]	58[2]	43[2]
Beef cows	18	28[1]	14[2]	22[2]
Sheep	215	440[1]	148[2]	169[2]
Pigs	1,149	402[1]	1,254[2]	382[2]
Laying hens	14,000	1,286[1]	280[2]	557[2]
Broilers	42,000	44,000[1]	14,300[2]	2,200[2]
Cereals (ha)	14.1	60.8[1]	24.1[2]	19.6[2]
Potatoes (ha)	7.6	16.0[1]	7.8[2]	3.1[2]

1. 2012, 2. 2010, 3. 2007, P= Provisional

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.

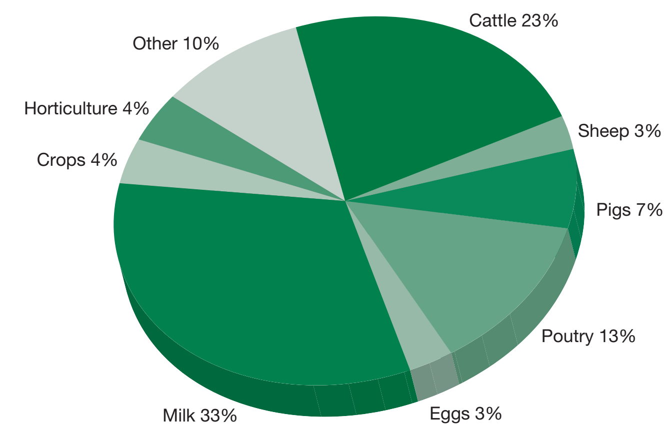
Note 2. Due to national accounting principles GVA figures do not include Single Farm Payment.

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

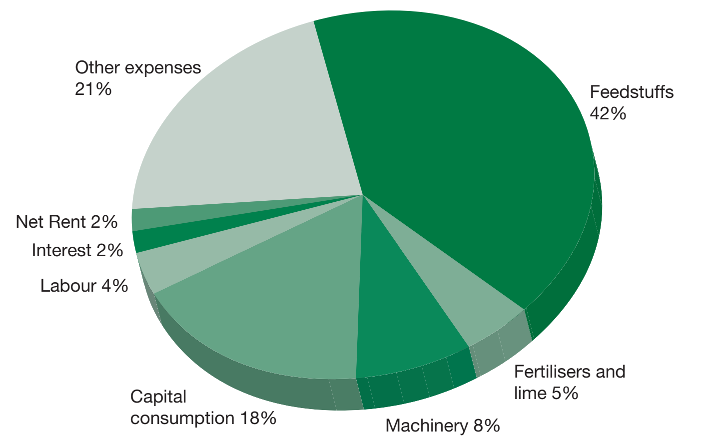
Note 4. The agricultural employment data is sourced from the Labour Force Survey, to enable comparison between countries.

COMPARISONS OF NI AND UK AGRICULTURE

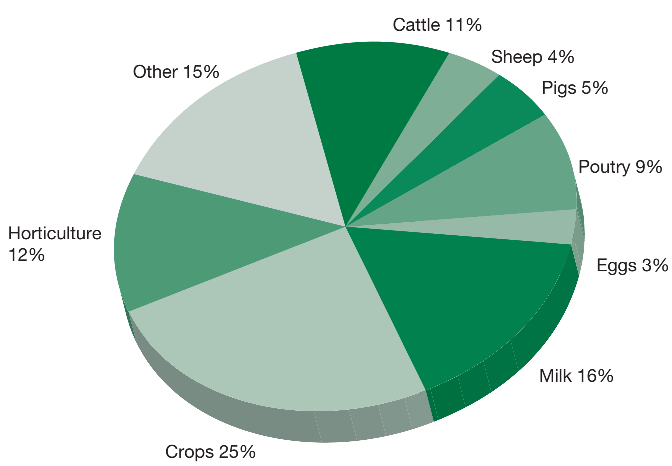
Gross output of NI agriculture, 2013



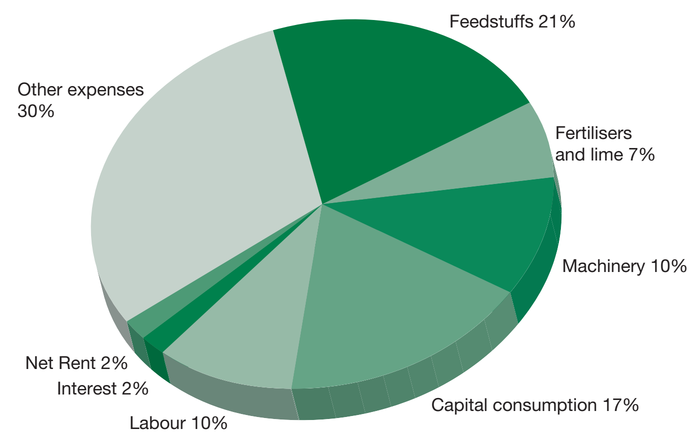
Total expenses of NI agriculture, 2013



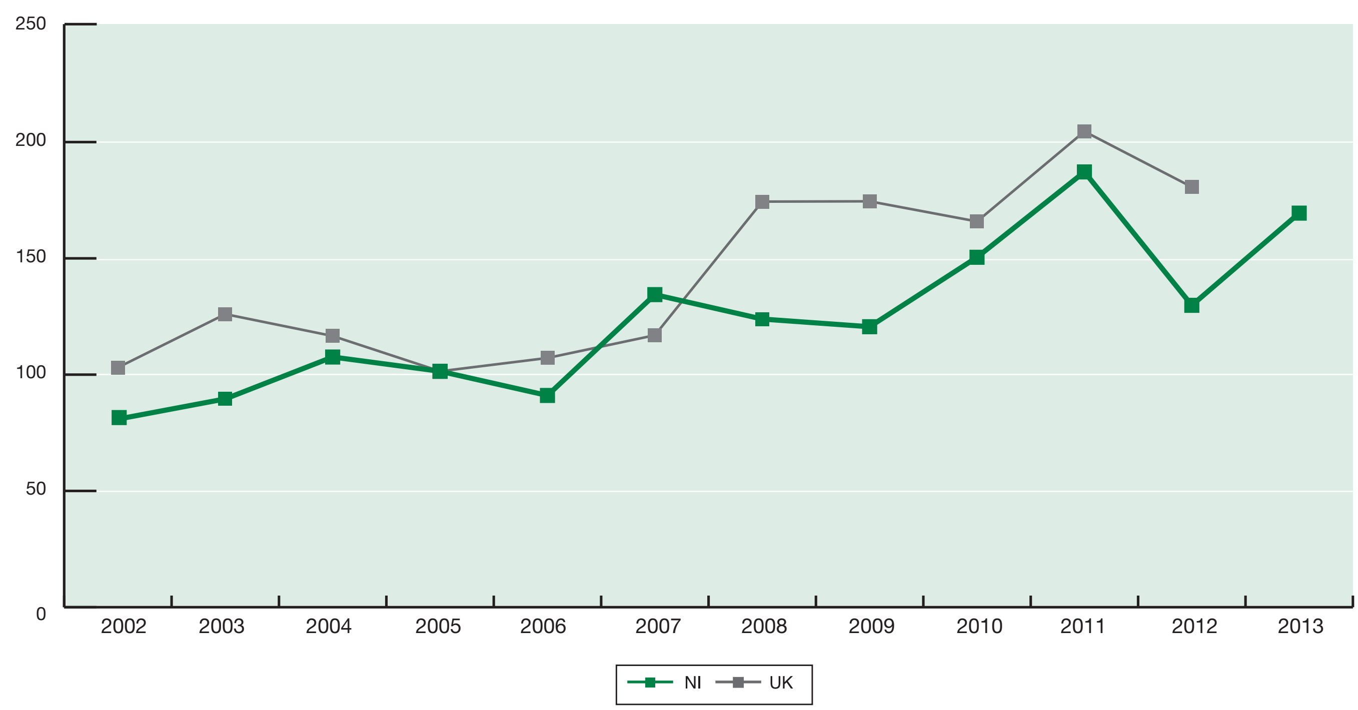
Gross ouput of UK agriculture, 2012



Total expenses of UK agriculture, 2012

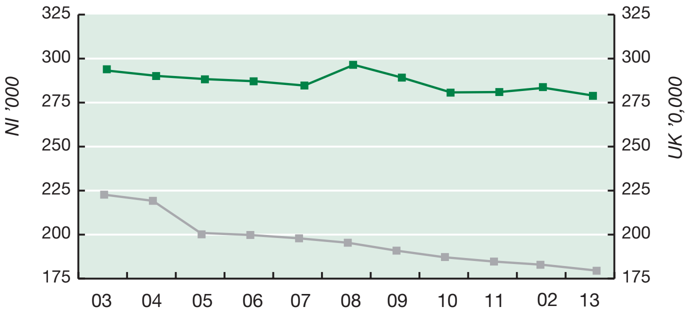


NI and UK Total Income from Farming Indices in real terms (2005 = 100)

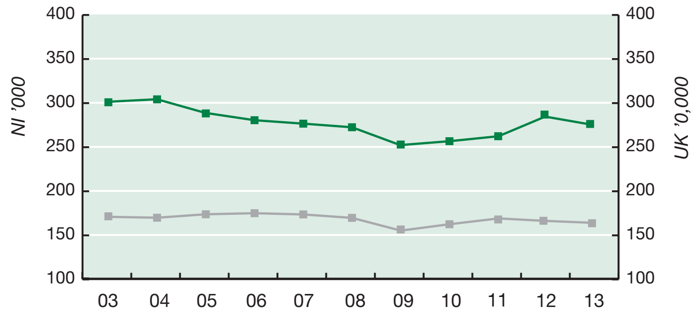


TRENDS IN NI AND UK LIVESTOCK NUMBERS AND CROP AREAS

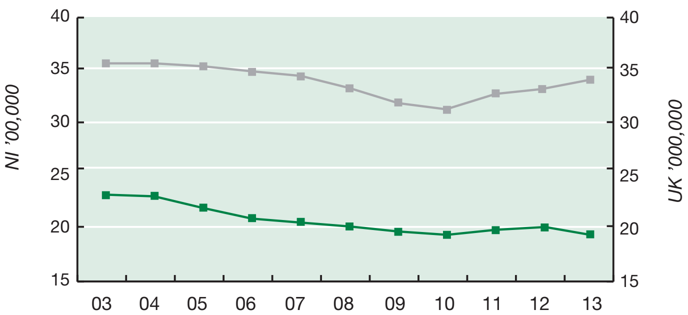
Dairy cows



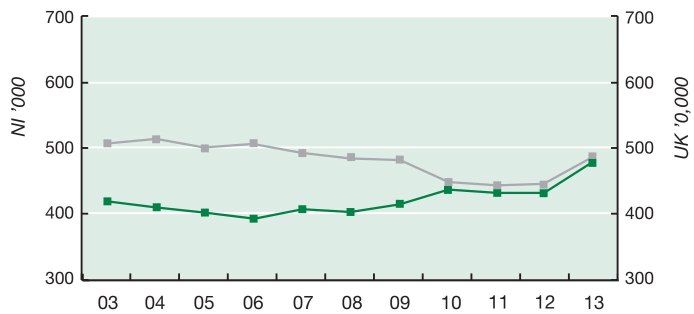
Beef cows



Sheep



Pigs



Breading and laying birds

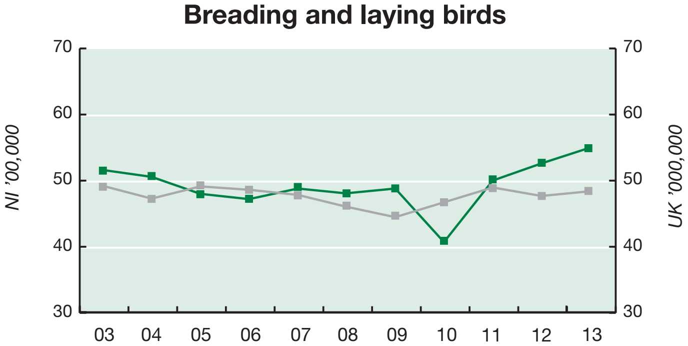
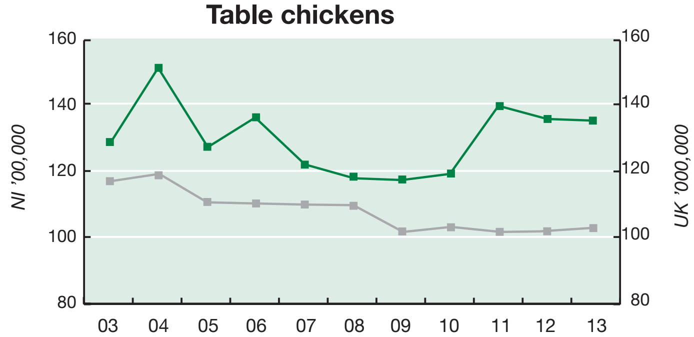
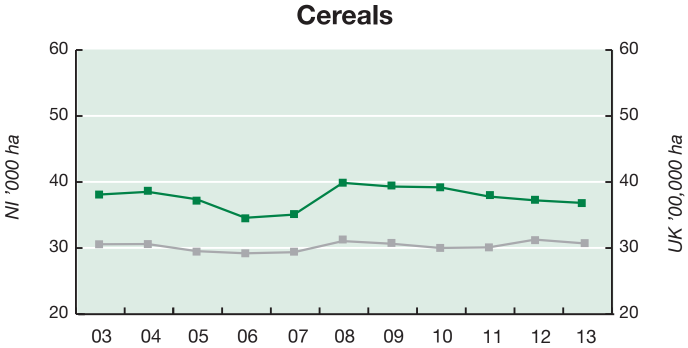


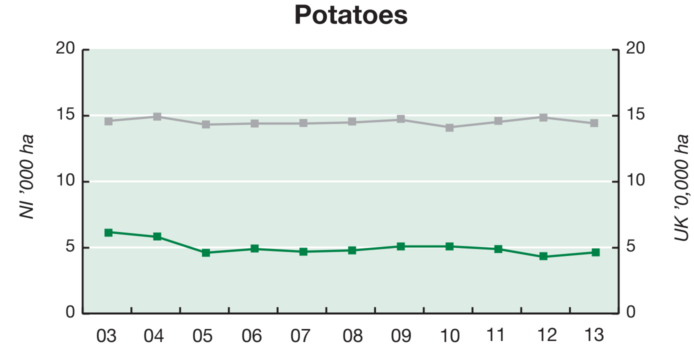
Table chickens



Cereals



Potatoes



NI UK

1. EXECUTIVE SUMMARY

Note: comparisons are with 2012 unless otherwise stated.

Aggregate income (Tables 2.1 - 2.3)

- The agricultural income of Northern Ireland farms increased significantly in 2013 (note this follows a very large decrease in 2012).
- **Total income from farming (TIFF)** - which measures the return to farmers, partners and directors, their spouses and other family workers for their labour, management input and own capital invested - increased by 33.7 per cent (31 per cent in real terms) to £298 million, from £223 million in 2012.
- Following the increase in 2013, TIFF is 30 per cent above the average of the last twenty years after accounting for inflation.
- The increase in income in 2013 can be attributed largely to improved producer prices for livestock and livestock products, especially milk where there was a 21 per cent in price in 2013. There was also an increase in farm subsidies mostly due to the fact that voluntary modulation was not applied in 2013.

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

- **Gross output** of Northern Ireland agriculture is estimated at £1.92 billion for 2013. This is an increase of 10 per cent compared to 2012. There were increases in the output of the dairy, beef, poultry, eggs, pigs and potatoes sectors, which were offset by decreases in output from the sheep and cereal sectors.
- **Gross input** or ('intermediate consumption') increased by 9.0 per cent, to £1.4 billion. Feedstuff costs, which accounted for 54 per cent of the gross input figure, rose by 11 per cent in 2013 to £800 million. The total cost of fertiliser (excluding lime) input rose by 23 per cent to £99.6 million as a result of a 24 per cent increase in volume purchased, which was partially offset by a 1.4 per cent reduction in price. Total machinery expenses increased by 1.1 per cent to £153 million in 2013. The increase was due to a 3.5 per cent rise in machinery repair costs the costs of fuel and oils which was partially offset by a 0.5 per cent reduction in the costs of fuel and oils.
- **Gross value added** increased by 14 per cent in 2013 to £445 million, while **net value added** - gross value added less consumption of fixed capital (or 'depreciation') plus subsidies such as the Single Farm Payment (SFP) - increased, by 21 per cent, to £433 million.

Productivity (Table 2.3)

- Changes in the volumes of outputs and inputs combined to produce a 0.6 per cent decrease in **total factor productivity (TFP)** - the productivity of all resources in the industry. **Single factorial terms of trade**, which is a measure of farmers' economic welfare, increased by 11 per cent.

The increase in this index indicates that the decrease in productivity was counteracted by an improvement in the ratio between inputs costs and farm-gate prices to leave an improvement on farmers' economic welfare.

Cash flow (Table 2.4)	• **Cash available to farm families from farming activity** was estimated to have risen in 2013 by 16 per cent, to £308 million. The increase in 2013 reflects the increase observed in TIFF, though an increase in capital investment decreased the amount of cash available to farmers. In this estimate, 'non-cash' 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 (Table 5.3-5.4)	• **Farm Business Income (FBI)** is now the headline measure of farm-level income used throughout the UK. Measured across all farm types, average **Farm Business Income** fell from £31,992 in 2011/12 to £19,336 in 2012/13, a decrease of £12,656 per farm. It is expected to increase from £19,336 in 2012/13 to £30,976 in 2013/14 i.e. an increase of £11,640 or 60 per cent per farm. At the individual farm type level, the results show that Farm Business Income is expected to increase between 2012/13 and 2013/14 for all farm types with the exception of cereal farms.
Subsidies (Table 2.10)	• The value of all **direct payments** to farmers increased in 2013 by £16.2 million or 8.7 per cent, to £311 million. This increase was mainly attributable to a rise in Single Farm Payment as a result of Voluntary Modulation not being applied in 2013. The total value of the Single Farm Payment estimated to have accrued in 2013 was £259 million, a net increase of 5.9 per cent or £15 million compared with 2012. Single Farm Payments account for approximately 83 per cent of all direct payments.
Labour (Table 2.14)	• The **total agricultural labour force** in 2013 increased marginally by 0.7 per cent to just under 47,800 persons. Within this total there was a 2 per cent rise in the number of full time farmers and a 2.8 per cent reduction in the number of part time farmers. The total number of full time, part time and casual workers combined increased by 2.1 per cent mostly driven by an increase in part time workers.
Livestock numbers (Table 3.3)	• The number of **cattle** recorded in the June 2013 census at just under 1.6 million, was a 2.3 per cent fall on the previous year. At June 2013, there were 279,500 dairy cows, approximately 2.1 per cent less than in 2012. There were 270,100 beef cows, 3.3 per cent less than in 2012.

In June 2013, the **sheep** breeding flock was 1.7 per cent smaller than in 2012 with 921,400 ewes. This reverse was the first dip in numbers since 2010 when numbers had reached a 15 year low of 875,900 ewes. Including lambs and other sheep the entire flock totalled 1.9 million in 2013.

- At June 2013, the number of **pigs** totalled 480,300, which was 13 per cent more than in 2012. There was an 11 per cent increase to 42,500 in sow numbers. **Broiler** numbers remained at similar levels to 2012 at 13.4 million birds, while the size of the **commercial laying flock** decreased by 4.6 per cent to 2.4 million birds.

Crops and grass areas (Table 3.2)

- There was a 3.1 per cent decrease, to 48,600 hectares, in the total **cropped area** between June 2012 and 2013. The total area of **cereals** was 35,900 hectares in June 2013, which was a decrease of 3.1 per cent compared to 2012. In 2013, the total area of potatoes grown was little changed on the previous year at 4,300 hectares.

Farm Numbers (Table 4.2)

- There were 24,503 active **farm businesses** in Northern Ireland at June 2013, which was 218 more than in 2012. For many years, there has been a general downward trend in total numbers of about 1.5 per cent per annum.

Agri-Food Sector Performance

- **Total Factor Productivity** of agriculture in Northern Ireland decreased marginally in 2013 and in 2012. The performance indicators for the **food and drinks processing sector** indicate growth over the period 2006 to 2011.

Rural Economy

- Over the years from 2008 to 2013, the average gross weekly earnings of people in rural areas were consistently below those of people living in urban areas. Data on net VAT registrations indicate that 69 per cent of total net registrations occurred in rural areas in the 10 year period from 2004 to 2013.

Animal Health and Welfare

- Since the first cases of BSE were reported in Northern Ireland during 1988, there has been a total of 2,189 cases. The number of BSE cases in Northern Ireland has declined significantly since the peak in 1993. There were no cases of BSE in 2013.

  During 2013, 1,479 new herds in Northern Ireland were affected by bovine tuberculosis compared with 1,513 new incidents in 2006 and 1,695 new incidents in 2012. There were 26 new brucellosis serological reactor breakdowns compared with 118 in 2006 and 23 in 2012. The last confirmed brucellosis breakdown occurred in February 2012. Bovine tuberculosis and brucellosis were at peak levels in 2002 and since that time the herd incidence for both diseases has reduced significantly.

The Veterinary Service (DARD) carried out 722 on-farm welfare inspections in 2013. Of the inspections carried out as a result of complaints, risk assessment (related to cross-compliance) and targeted visits 76 per cent were fully compliant with legislation, while for random visits 99 per cent were fully compliant with legislation.

Agri-environment and GHG emissions

- In 2013, some 388,000 hectares or 37 per cent of farmland was registered in an agri-environmental scheme in an agri-environmental scheme in Northern Ireland. In 2011, 23 per cent of river water-bodies were classified as 'high' or 'good'. This was an increase of one percentage point compared with 2010. In 2010, agriculture was estimated to contribute 26 per cent of all greenhouse gas emissions in Northern Ireland. However, total emissions from agriculture fell by 10 per cent between 1990 and 2010.

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2. THE AGRICULTURAL ECONOMY

A. AGGREGATE OUTPUT, INPUT AND INCOME

Methodological note

A series of the Aggregate Agricultural Account covering several decades is available on the DARD website, at www.dardni.gov.uk. In the following commentary, comparisons are with 2012 unless otherwise stated.

Summary

The estimated income of Northern Ireland agriculture increased in 2013. **Total income from farming (TIFF)** - which represents the return on own labour, management input and own capital invested for all those with an entrepreneurial involvement in farming (including all members of the family working on farm) - increased by 33.7 per cent (31.0 per cent in real terms) to just over £298 million, from £223 million in 2012 (see Table 2.1).

Output

The value of **gross output** was estimated at £1.92 billion in 2013, which was an increase of 10 per cent compared with 2012. The rise is primarily explained by an increase in the value of milk, beef, poultry and eggs output.Full details of trends in all the individual outputs are given in Section 2B.

Inputs (or 'intermediate consumption')

The value of **gross input** increased in 2013, by 9.0 per cent, to £1.5 billion. Most of this increase is explained by additional additional expenditure on feedstuffs, and fertiliser. The rise in expenditure on feedstuffs by £81 million was due to a 4.4 per cent rise in the volume purchased and a 6.4 per cent increase in the average price per tonne. Full details of trends in individual inputs are given in Section 2B.

Gross and net value added

Gross value added - gross output less gross input - increased by 14 per cent in 2013 to £445 million. **Net value added** (at factor cost), i.e. gross value added less consumption of fixed capital (or 'depreciation') plus subsidies such as the Single Farm Payment (SFP) - increased by 21 per cent, to £433 million.

Net value added is the residual value when deductions are made from Gross Value added for depreciation and additions made for subsidies received. The cost of paid labour (also termed 'compensation of employees') in 2013 remained consistent with 2012 levels at £67 million. The total cost of borrowings in agriculture (including financial intermediation services indirectly measured (FISIM)) was £37 million in 2013, 0.3 per cent higher than in 2012. In 2013, interest rates remained low and there was a 0.4 per cent decrease in the level of borrowings. Conacre rent paid to non-farmers remained at a level similar to 2012.

Total Income from farming

The net result of these changes was that **total income from farming (TIFF)** increased in 2013, by 33.7 per cent to £298 million, a rise of 31 per cent after allowing for inflation. Following the increase in 2013, TIFF was 30 per cent above the average of the last twenty years after accounting for inflation. Over the same 20-year period, the number of persons drawing an income from farming also declined steadily. From 1994 to 2013, the number of units of entrepreneurial labour decreased by 27 per cent with the result that, in real terms, TIFF per unit of entrepreneurial labour in 2013 was 47 per cent above the 20-year average.

Cash flow

TIFF measures the return (on own labour, management input and own capital invested) 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, 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 non-cash 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** was estimated to have risen in 2013 by 16 per cent, to around £308 million.

Subsidies

Total direct payments to farmers increased in 2013 by £16 million or 8.7 per cent, to £311 million. The total value of the Single Farm Payment estimated to have accrued in 2013 was £259 million, a net increase of 5.9 per cent or £15 million compared with 2012. The increase in 2013 can be attributed to the fact that voluntary modulation was not applied in 2013. Single Farm Payments account for approximately 83 per cent of all direct payments. Direct payments exclude the value of market support such as import protection and export refunds.

Investment **Gross annual capital investment** decreased by 1.8 per cent or £3.6 million in 2013 to £192 million. Within this total there was a 0.7 per cent decrease in total investment in plant, machinery and vehicles, while investment in buildings and works was down by 4 per cent. Granted aided investment was very low compared with previous years at £0.18 million.

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

£ million

	2008	2009	2010	2011	2012	2013 (provisional)
OUTPUT[2]						
Livestock and livestock products[3]						
Finished cattle and calves[4]	323.4	329.5	314.0	351.8	413.1	440.1
Finished sheep and lambs[5]	49.9	54.3	60.1	53.5	61.5	58.2
Finished pigs	76.8	91.7	95.1	106.0	116.7	132.5
Poultry[6]	182.3	202.5	217.9	241.8	240.6	256.9
Eggs[7]	35.2	43.8	52.6	56.6	65.6	67.0
Milk	445.0	353.8	470.7	543.7	519.7	627.5
Minor products[8]	10.1	10.6	12.4	13.4	12.9	15.5
Total livestock and livestock products	**1,122.7**	**1,086.2**	**1,222.9**	**1,366.8**	**1,430.1**	**1597.6**
Field crops						
Potatoes	20.5	21.4	22.8	25.6	19.3	24.6
Cereals	34.3	25.6	34.4	44.0	38.8	38.4
of which: barley	19.0	15.4	18.8	24.7	25.1	25.1
wheat	13.7	8.9	13.7	17.2	11.8	11.4
oats	1.6	1.3	1.9	2.2	1.9	1.9
Other crops[9]	11.2	14.2	14.1	12.5	13.5	14.1
Total field crops	**66.0**	**61.3**	**71.4**	**82.1**	**71.7**	**77.3**
Horticultural products						
Fruit	9.5	4.5	7.1	7.4	5.5	10.0
Vegetables	16.0	14.6	13.1	17.6	15.0	18.3
Mushrooms	22.4	19.9	19.7	24.7	28.3	30.6
Ornamental and hardy nursery stock	11.7	10.5	8.4	10.9	9.5	12.1
Total horticultural products	**59.6**	**49.5**	**48.3**	**60.5**	**58.3**	**71.0**
Capital formation (breeding livestock)	82.5	65.3	92.0	113.1	98.1	86.1
Agricultural contract work[10]	60.2	60.0	65.2	69.6	70.7	73.9
Milk quota leasing	0.0	0.0	0.0	0.0	0.0	0.0
Inseparable non-agricultural activities[11]	17.3	17.3	15.0	15.1	15.1	15.2
A Gross output	**1,408.3**	**1,339.6**	**1,514.7**	**1,707.1**	**1,744.0**	**1,921.0**
of which:						
subsidies (less taxes) on products[12]	4.5	0.0	3.7	0.0	0.0	0.0

1. A description of the methodology relating to this series and the derivation of the main aggregates, is given in the Appendix.
2. Output represents the estimated value of home-produced sales, including the value of inter-farm transfers and on-farm use (see Appendix). It includes the value of subsidies on products, the sale value of store animals imported from the Republic of Ireland and Great Britain and finished in Northern Ireland and the value of produce used in farm households. Stock change estimates are included within the individual output and input items.
3. Includes finished, 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 receipts from the Older Cattle Disposal Scheme. The LFA Compensatory Allowance is included in 'other subsidies'.
5. The LFA Compensatory Allowance is included in 'other subsidies'.
6. Includes shipments and exports of breeding and non-breeding birds, and eggs for hatching.
7. Includes eggs for processing and duck eggs.
8. Includes horses, wool, deer and minor livestock products.
9. Hay, straw, flax, linseed, oilseed rape, mixed corn, protein crops, lawn turf, triticale, hemp, forage crops and associated Protein Crop Premium Payments.

Table 2.1 contd.

		2008	2009	2010	2011	2012	2013 (provisional)
							£ million
A	**Gross output**	**1,408.3**	**1,339.6**	**1,514.7**	**1,707.1**	**1,744.0**	**1,921.0**
	INPUT (also known as 'intermediate consumption')						
	Expenditure						
	Feedstuffs[13]	522.0	535.9	583.9	634.7	719.2	800.3
	Seeds[14]	8.7	9.4	8.4	8.9	8.8	9.3
	Marketing expenses[15]	33.4	33.5	33.8	35.1	35.5	42.6
	Fertilisers and lime	83.9	53.2	73.9	79.9	82.7	101.1
	Total machinery expenses (excl. depreciation)	122.7	121.2	131.6	149.9	151.4	153.0
	Farm maintenance	40.1	41.2	46.6	46.5	43.3	44.7
	Veterinary expenses and medicines	44.3	46.1	50.9	55.2	55.2	56.6
	Other variable costs[16]	80.8	81.6	84.5	96.6	92.4	97.8
	Miscellaneous expenses[17]	67.1	70.2	73.2	75.9	78.6	80.0
	Agricultural contract work	60.2	60.0	65.2	69.6	70.7	73.9
	Milk quota leasing	0.0	0.0	0.0	0.0	0.0	0.0
	FISIM[18]	12.4	14.8	16.3	16.5	16.9	16.9
B	**Gross input**	**1,075.7**	**1,067.2**	**1,168.1**	**1,264.8**	**1,354.6**	**1,476.1**
C	**Gross value added (A-B)**	**333.5**	**272.5**	**346.5**	**442.4**	**389.5**	**444.9**
	Consumption of fixed capital						
	- livestock	68.5	50.2	69.3	75.3	73.6	72.7
	- plant, machinery and vehicles	91.1	98.3	105.5	114.3	122.1	120.8
	- buildings and works	136.1	134.8	118.8	119.1	122.3	120.4
D	**Total consumption of fixed capital**	**295.7**	**283.3**	**293.6**	**308.7**	**318.0**	**313.9**
	Other subsidies (not paid on products)[19]	304.7	336.5	326.9	319.9	294.6	310.8
	Other taxes (not levied on products)[20]	6.8	6.9	7.4	7.8	8.2	8.4
E	**Other subsidies (less taxes)**	297.9	329.6	319.6	312.1	286.4	302.4
F	**Net value added (at factor cost) (C-D+E)**	**334.8**	**318.7**	**372.5**	**445.7**	**357.8**	**433.4**
G	Paid labour	53.5	54.8	54.9	60.2	67.1	67.2
H	Interest	41.4	26.0	22.4	20.2	20.0	20.1
I	Net rent[21]	46.0	45.1	46.5	48.2	47.8	47.9
J	**Total income from farming[22] (F-G-H-I)**	**193.9**	**192.9**	**248.7**	**317.1**	**222.9**	**298.2**

10. Receipts to both farmer contractors and specialist contractors.

11. Receipts from non-agricultural activities which use farm resources.

12. See Table 2.10 for details of the individual items included within this item.

13. Includes home-fed cereals, proteins, forage crops, hay and stockfeed potatoes. In 2013 includes additional cost of fodder imported under the fodder transport scheme.

14. Includes home-saved seed.

15. Hired transport charges, auction fees, slaughter charges and inter farm expenses.

16. Livestock costs other than veterinary and medicines, crop protection, other crop costs, packaging and royalties and levies.

17. Electricity, heating fuel, water rates, fire insurance and other overheads.

18. FISIM - Financial Intermediation Services Indirectly Measured. A description is provided on page 28.

19. Includes Single Farm Payment, LFA Compensatory Allowance, payments for the non-capital element of the Environmentally Sensitive Area Scheme, Countryside Management Scheme and other minor grants and subsidies.

20. Farm rates and vehicle road tax.

21. Conacre payments to non-producing landowners.

22. 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: 2005 = 100

	2008	2009	2010	2011	2012	2013 (provisional)
Index at current prices						
Net value added[1]	120.8	115.0	134.4	160.9	129.1	156.4
Total income from farming[1]	133.0	132.3	170.6	217.5	152.9	204.5
Index in real terms[2]						
Net value added	111.2	103.6	117.4	137.4	108.4	128.6
Total income from farming	122.4	119.2	149.0	185.7	128.4	168.1

1. For definitions see Appendix.
2. Deflated by the Gross Domestic Product deflator.

Table 2.3 Output and input volume and productivity indices

Indices: 2005 = 100

	2008	2009	2010	2011	2012	2013 (provisional)
Gross output volume[1]	102.1	99.8	102.9	105.7	106.4	108.7
Gross input volume[1]	101.1	104.6	107.8	106.0	109.3	113.9
Gross value added volume[1]	103.3	93.5	96.3	105.3	102.6	101.7
Net value added volume[1]	104.0	86.9	89.5	102.5	98.4	96.7
Total factor productivity[2]	103.8	99.8	100.3	102.5	100.5	99.9
Labour productivity[3]	108.0	92.1	96.5	110.7	105.3	102.0
Single factorial terms of trade[4]	97.3	99.2	105.6	103.1	96.8	107.5

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 at constant 2000 prices.
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).
4. Single factorial terms of trade measures changes in farmers' economic welfare. See section A in Chapter Six for a full explanation of this concept.

Table 2.4 Estimated cash flow for agriculture

£ million

	2008	2009	2010	2011	2012	2013 (provisional)
Total income from farming	**194.1**	**191.2**	**254.7**	**317.1**	**222.9**	**298.2**
Less:						
output stock change	+1.5	-3.1	+1.2	-18.9	+3.1	-7.4
gross fixed capital formation (breeding livestock)	82.5	65.3	92.0	113.1	98.1	86.1
capital investment[1]	335.7	218.2	211.7	219.7	181.2	223.8
Plus:						
input stock change	-0.2	+2.1	+2.2	-3.3	-0.1	+1.4
capital consumption	295.5	248.5	295.1	308.7	318.0	313.9
capital grants paid in year[2]	34.2	67.9	2.4	4.4	2.2	0.0
change in borrowings	78.3	55.1	-23.0	-46.2	4.9	-3.1
Cash available to farm families from farming	**182.3**	**284.3**	**226.6**	**266.9**	**265.6**	**308.0**

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

2012

Sector	Adjusted outputs[1]	Estimated specific costs[2]: Feedstuffs	Estimated specific costs[2]: Fertilisers, seeds & sprays	Estimated specific costs[2]: Others	Estimated specific costs[2]: Total	Sector gross margins[3]	
	£m	£m	£m	£m	£m	£m	%
Dairy cows and followers	600.5	193.3	24.0	10.1	227.5	373.0	51.7%
Beef cattle, rearing and fattening	357.6	175.6	41.1	23.9	240.7	116.9	16.2%
Sheep and wool	63.6	22.4	13.5	4.3	40.3	22.8	3.2%
Total grazing livestock	**1,021.7**	**391.4**	**78.6**	**38.4**	**508.5**	**512.7**	**71.0%**
Pigs	116.7	89.7	-	3.7	93.4	23.3	3.2%
Poultry	306.1	233.4	-	7.8	241.2	64.8	9.0%
Total pigs and poultry	**422.8**	**323.1**	**-**	**11.5**	**334.6**	**88.2**	**12.2%**
Cereals	52.1	-	12.5	-	12.6	39.6	5.5%
Potatoes	19.3	-	5.7	-	5.7	13.6	1.9%
Total field crops	**71.4**	**-**	**18.2**	**0.1**	**18.3**	**53.2**	**7.4%**
Horticulture[4]	58.3	-	12.7	4.7	17.4	40.6	5.7%
Other items	36.1	7.0	1.9	0.2	9.1	27.0	3.7%
Total	**1,610.4**	**721.5**	**111.5**	**54.8**	**887.9**	**721.6**	**100.0%**

2013 (Provisional)

Sector	Adjusted outputs[1]	Estimated specific costs[2]: Feedstuffs	Estimated specific costs[2]: Fertilisers, seeds & sprays	Estimated specific costs[2]: Others	Estimated specific costs[2]: Total	Sector gross margins[3]	
	£m	£m	£m	£m	£m	£m	%
Dairy cows and followers	708.6	220.8	29.5	10.8	261.1	447.5	56.3%
Beef cattle, rearing and fattening	372.4	195.5	50.5	25.0	271.0	101.4	12.8%
Sheep and wool	60.4	26.9	17.0	4.6	48.5	11.9	1.5%
Total grazing livestock	**1,141.5**	**44.3**	**97.0**	**40.3**	**580.6**	**560.8**	**70.6%**
Pigs	132.5	94.8	-	3.7	98.5	34.0	4.3%
Poultry	324.4	254.4	-	8.6	263.0	61.7	7.7%
Total pigs and poultry	**456.8**	**349.2**	**-**	**12.2**	**361.5**	**95.7**	**12.0%**
Cereals	53.3	-	13.1	-	13.2	40.1	5.1%
Potatoes	24.3	-	5.8	-	5.8	18.4	2.4%
Total field crops	**77.5**	**-**	**18.9**	**0.1**	**19.0**	**58.6**	**7.4%**
Horticulture[4]	71.0	-	13.5	5.1	18.6	52.4	6.6%
Other items	37.3	7.5	2.4	0.2	10.1	27.3	3.4%
Total	**1,784.1**	**800.0**	**131.8**	**57.9**	**989.7**	**794.7**	**100.0%**

1. 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.
2. 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.
3. '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.
4. Horticulture comprises fruit, vegetables, mushrooms, flowers and hardy nursery stock.

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

	Units of quantity	2008	2009	2010	2011	2012	2013 (provisional)
Livestock and livestock products							
Cattle and calves[2]	tonnes dcw	140,749	143,299	147,932	143,072	140,909	139,540
Sheep and lambs	,,	18,818	19,069	17,274	15,665	18,932	17,951
Pigs[3]	,,	70,155	73,679	81,377	86,388	91,602	92,879
Cattle and calves	'000 head	448	453	475	463	458	470
Older Cattle Disposal Scheme	,,	20	-	-	-	-	-
Sheep and lambs	,,	862	858	768	693	842	807
Pigs[3]	,,	867.8	885.7	986.6	1,044.0	1,103.2	1,103.4
Poultry[4]	'000 tonnes lwt	242.4	256.6	266.5	260.0	259.5	269.5
Eggs[5]	m. doz	62	65	81	83	81	90
Milk[6]	m. litres	1,906	1,775	1,852	1,966	1,966	1,983
Field crops							
Wheat	'000 tonnes	83.9	80.2	81.1	89.7	71.8	56.7
Barley	,,	126.7	134.4	137.7	137.3	134.1	137.2
Oats	,,	11.3	10.3	12.5	12.8	11.6	9.6
Potatoes	,,	172	183	183	199	177	154
Horticultural crops							
Fruit	'000 tonnes	55.0	37.9	42.2	48.1	40.6	33.5
Vegetables	,,	50.3	41.5	35.0	37.8	33.4	41.6
Mushrooms	,,	18.2	16.4	16.3	17.7	20.1	22.0

1. Estimated home-produced sales, on-farm use and household consumption. See Footnote 2 to Table 2.1.
2. Due to a change from EC to UK Dressing Specification in week 4 of January 2009, prices expressed in kilograms and dressed carcase weights from 2009 are not directly comparable with previous years.
3. Includes exports of store pigs.
4. Excludes shipments and exports of breeding and non-breeding birds and hatching eggs.
5. Includes eggs for processing and duck eggs.
6. Includes farmhouse consumption.

Table 2.7 Average producer prices[1] of agricultural products

£ per unit

	Unit	2008	2009	2010	2011	2012	2013 (provisional)
Finished steers, heifers and young bulls	head	822	864	842	977	1,074	1,157
Finished steers, heifers and young bulls[2,]	kg dwt	2.48	2.61	2.55	2.92	3.17	3.53
Calves slaughtered or exported	head	117	117	132	153	152	136
Culled cows and bulls	head	588	605	617	714	740	785
Culled cows and bulls[2]	kg dwt	1.89	1.97	1.95	2.29	2.44	2.57
Older cattle disposal scheme	head	231	-	-	-	-	-
Store cattle exported	head	533	580	607	668	711	762
Finished sheep and lambs	head	61.34	71.05	80.19	88.47	77.23	82.47
Finished sheep and lambs	kg dwt	2.91	3.32	3.72	4.07	3.59	3.87
Finished clean pigs	head	92.96	110.38	105.00	110.28	115.46	130.71
Finished clean pigs	kg dwt	1.16	1.33	1.28	1.34	1.40	1.56
Milk[3]	litre	0.233	0.199	0.254	0.277	0.262	0.317
Eggs for consumption	dozen	0.573	0.678	0.651	0.682	0.805	0.745
Broilers	kg lwt	0.666	0.708	0.716	0.803	0.804	0.860
Potatoes:							
Ware maincrop[4]	tonne	126	125	125	121	152	196
Seed	tonne	171	176	171	178	156	211
Barley	tonne	145	111	135	179	196	180
Wheat	tonne	145	121	152	191	203	196
Mushrooms	tonne	1,232	1,213	1,210	1,390	1,410	1,390
Apples	tonne	148	152	137	133	183	255

1. Before deduction of marketing charges, commissions and levies, where applicable.
2. See note 2 Table 2.6
3. Before deduction of superlevy, if applicable.
4. Does not include early potatoes. Therefore, the price differs from that quoted in Table 2.27.

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

Indices: 2005 = 100

	Weights[2]	2008	2009	2010	2011	2012	2013 (provisional)
Finished steers and heifers	241	139	147	143	164	178	198
Culled cows and bulls	28	198	207	205	241	257	270
Store cattle exported	3	129	140	147	161	172	184
Finished sheep and lambs	44	124	141	158	173	152	164
Finished clean pigs	66	121	139	133	139	146	162
Milk	357	127	109	139	151	143	173
Eggs for consumption	23	151	188	180	189	223	206
Broilers	109	131	140	141	158	159	170
Potatoes:							
Ware maincrop	12	143	141	142	137	173	223
Seed	2	180	185	180	181	164	221
Barley	11	175	133	163	215	235	216
Wheat	6	169	141	177	223	237	229
Mushrooms	25	100	98	98	113	114	113
Apples	6	121	125	112	109	151	210
Total products index[2]	**931**	**133**	**132**	**143**	**159**	**161**	**182**
Inputs index[3]	**1,000**	**142**	**133**	**138**	**158**	**168**	**182**

1. The indices relate to prices from which marketing expenses have not been deducted.
2. The total products index is calculated by taking into account the significance of each item in the base period (2005). 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. This index does not cover all inputs. It comprises feedstuffs, seeds, fertilisers and lime, and marketing expenses.

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

£ per head

	2008	2009	2010	2011	2012	2013
CATTLE						
Breeding cattle						
Dairy cows/heifers in milk	1,120	988	1,188	1,273	1,251	1,234
Dairy cows in calf	910	878	1,102	1,195	1,157	1,063
Dairy springing heifers	1,094	948	1,041	1,227	1,130	1,140
Beef cows/heifers with calf at foot	781	879	923	1,091	1,098	1,064
Beef cows in calf	588	711	757	868	895	864
Beef springing heifers	682	831	895	1,008	1,088	905
Store cattle						
150-300 kg steers	393	430	445	513	532	540
300-400 kg steers	493	537	556	617	661	689
400-500 kg steers	604	649	658	735	794	864
Over 500 kg steers	764	820	808	936	1,029	1,114
150-300 kg heifers	338	383	422	473	498	491
300-400 kg heifers	448	490	526	580	626	649
400-500 kg heifers	571	621	642	723	779	844
Over 500 kg heifers	713	768	768	891	982	1,063
Suckled calves						
Under 200 kg steers	239	257	274	369	372	356
Over 200 kg steers	444	498	524	593	642	650
Under 200 kg heifers	238	286	309	382	401	370
Over 200 kg heifers	388	436	476	543	581	575
Dropped calves						
For rearing	118	120	136	166	163	139
Cull cows	521	557	557	692	701	695
SHEEP						
Breeding ewes/hoggets						
Blackface	70.74	85.27	116.61	89.28	107.04	109.13
Blackface Cross	71.05	92.52	109.77	135.07	106.92	117.71
Other breeds	72.65	96.95	119.33	138.74	109.70	103.43
Breeding ewe lambs						
Blackface	49.64	60.60	80.85	79.71	67.49	72.35
Blackface Cross	49.15	64.30	75.43	82.35	62.76	62.58
Other breeds	56.45	66.10	76.93	95.33	71.90	76.14
Breeding ewes/hoggets with lamb(s) at foot						
Blackface	52.02	72.00	76.65	113.18	89.00	115.00
Blackface Cross	75.30	99.79	137.57	168.14	135.74	103.67
Other breeds	83.32	109.01	139.71	169.10	157.72	120.09
Cull ewes						
Blackface	19.23	33.14	42.24	45.30	33.65	30.28
Blackface Cross	22.98	48.66	59.64	62.10	49.44	41.29
Other breeds	35.63	55.98	66.99	72.07	59.93	51.31
Cull rams	40.62	59.71	70.39	74.37	65.78	56.23
Store lambs	36.33	44.86	57.99	62.28	49.84	54.77

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

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

£ million[3]

	2008[4]	2009[4]	2010[4]	2011[4]	2012[4]	2013[4] (provisional)
DIRECT PAYMENTS[5]						
Single farm payment	**255.3**	**290.2**	**271.3**	**266.5**	**244.6**	**259.0**
Cattle						
Older Cattle Disposal Scheme	4.5	-	-	-	-	-
Beef Quality Initiative	0.2	0.1	-	-	-	-
Total cattle	**4.8**	**0.1**	**-**	**-**	**-**	**-**
Milk						
EU Dairy Fund	-	-	3.7	-	-	-
Total milk	**-**	**-**	**3.7**	**-**	**-**	**-**
Other direct payments						
Environmentally Sensitive Areas (non-capital)	7.7	6.5	7.6	8.4	5.5	5.7
LFA Compensatory Allowance	22.0	22.5	24.9	24.4	25.2	24.9
Countryside Management Scheme (non-capital)	18.5	16.2	22.7	20.2	18.9	19.7
New Entrants Scheme	0.5	0.9	0.4	0.4	0.3	0.2
Others[6]	0.4	0.2	0.1	0.1	-	1.3
Total other direct payments	**49.1**	**46.2**	**55.7**	**53.4**	**50.0**	**51.8**
Total direct payments	**309.2**	**336.5**	**330.6**	**319.9**	**294.6**	**310.8**
LEVIES[7]						
Milk						
Superlevy	-	-	-	-	-	-

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. Single Farm Payments after 'modulation' (i.e.reduction) of 11% (6% on first €5,000) in 2008 12% (7% on first €5,000) in 2009, 13% (8% on first €5,000) in 2010, 14% (9% on the first €5,000) in 2011, 14% (9% on the first €5,000) in 2012 and 10% (0% of the first €5,000) in 2013.
   After application of €5,000 franchise per farm from 2005, total modulation amounted to £26.7 million in 2008, £33.4 million in 2009, £34.7 million in 2010, £37.6 million in 2011, £35.0 million in 2012 and £19.7 million in 2013. In 2013 financial discipline of £6.1million was deducted from the Single Farm Payment.
5. Excludes expenditure on market regulation (such as intervention purchases and export refunds) by the UK Rural Payments Agency.
6. Includes Organic Farming Scheme and other miscellaneous payments. In 2013 this includes £1.3 million for fodder transport scheme.
7. Excludes non-government levies.

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

£ million[2]

	2008	2009	2010	2011	2012	2013 (provisional)
CAPITAL GRANTS						
Environmentally Sensitive Areas	0.4	0.2	-	-	-	-
Countryside Management Scheme	0.8	0.4	-	-	-	-
Investment in agricultural holdings	-	-	-	-	-	-
Farm Nutrient Management Scheme	92.5	-	-	-	-	-
Farm Modernisation Scheme	-	2.2	2.1	5.5	1.2	-
Total capital grants	**93.6**	**2.8**	**2.1**	**5.5**	**1.2**	**0.0**
OTHER DIRECT PAYMENTS						
Other animal disease compensation[3]	16.2	12.7	10.1	12.5	16.9	13.3
Snow Hardship Fund	-	-	-	-	-	2.7
Total other direct payments[4]	**16.2**	**12.7**	**10.1**	**12.5**	**16.9**	**16.0**

1. These data relate to monies due rather than monies actually received (ie. they are on an accruals basis).
2. Dashes (-) indicate payments of nil or less than £50,000.
3. Includes tuberculosis, brucellosis, and BSE reactor compensation payments.
4. Includes miscellaneous minor payments.

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

£ million

	2008	2009	2010	2011	2012	2013 (provisional)
Grant-aided investment[2]	49.6	114.2	5.9	11.0	5.6	0.1
Non-aided investment	148.8	136.5	126.4	81.3	64.2	66.9
Total buildings and works[3]	**198.4**	**250.7**	**132.3**	**92.3**	**69.8**	**67.0**
Plant and machinery	104.4	115.8	124.1	149.1	111.2	110.5
Vehicles[3,4]	13.0	11.1	15.9	15.8	14.2	14.0
Total plant, machinery and vehicles	**117.4**	**126.9**	**140.0**	**164.9**	**125.4**	**124.5**
Total investment	**315.8**	**377.6**	**272.3**	**257.2**	**195.1**	**191.5**

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 Milk quota

	2008	2009	2010	2011	2012	2013 (provisional)
Milk quota (million litres):						
Owned[1]	1,879.1	1,914.1	1,918.0	1,944.0	1,999.1	2,010.8
Leased[2]	4.5	2.2	-	-	-0.7	-
Total	**1,883.6**	**1,916.3**	**1,918.0**	**1,944.0**	**1,998.4**	**2,010.8**

1. Permanent wholesale and direct sale quota as at 31 March each year.
2. Quota leased-in, less quota leased-out in Northern Ireland as at 31 March each year.

Table 2.14 Number of persons working on farms

number of persons

	2008	2009	2010	2011	2012	2013
AGRICULTURAL LABOUR FORCE[1]						
Farmers and partners						
Full time	16,931	16,437	15,965	15,823	15,886	16,235
Part time	14,166	13,830	13,596	13,320	13,171	12,798
Total	**31,097**	**30,267**	**29,561**	**29,143**	**29,057**	**29,033**
Spouses of farmers	**6,229**	**6,221**	**6,206**	**6,263**	**6,293**	**6,391**
Other workers						
Full time	3,089	3,106	3,109	3,249	3,422	3,464
Part time	2,803	3,220	3,187	3,436	3,754	4,009
Casual/seasonal	5,746	5,217	4,885	4,757	4,938	4,899
Total other workers	**11,638**	**11,543**	**11,181**	**11,442**	**12,114**	**12,372**
Total agricultural labour force	**48,964**	**48,031**	**46,948**	**46,848**	**47,464**	**47,796**
Annual Work Units (AWUs)[2]	**28,894**	**28,314**	**27,820**	**27,787**	**28,051**	**28,439**

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

	2008	2009	2010	2011	2012	2013
MANPOWER STATISTICS[1]						
Self-employed						
Male	16,049	15,622	15,154	15,185	15,288	15,612
Female	882	815	811	638	598	623
Total	**16,931**	**16,437**	**15,965**	**15,823**	**15,886**	**16,235**
Employees						
Male	10,126	10,047	9,704	9,963	10,535	10,807
Female	1,512	1,496	1,477	1,479	1,579	1,565
Total	**11,638**	**11,543**	**11,181**	**11,442**	**12,114**	**12,372**
Total agricultural manpower	**28,569**	**27,980**	**27,146**	**27,265**	**28,000**	**28,607**

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 Gross Turnover of the food and drinks processing sector[1,2]

£ *million*

	2007	2008	2009	2010	2011	2012 (provisional)
Animal by-products	16	18	20	23	23	25
Bakeries	218	252	262	260	271	274
Beef and sheepmeat	658	749	875	972	1,021	1,125
Drinks	315	340	330	350	361	378
Eggs	46	61	77	89	101	108
Fish	67	64	69	67	74	76
Fruit and vegetables	174	187	207	221	239	240
Milk and milk products	693	818	777	875	975	947
Pigmeat	178	197	230	244	250	296
Poultrymeat	474	508	594	645	670	685
Total processing sector	**2,839**	**3,194**	**3,441**	**3,746**	**3,985**	**4,154**

1. 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, Subsector Statistics",* DARD. Figures for 2012 have been estimated by adjusting the 2011 baseline, largely on the basis of information available within DARD.
2. These figures do not include an estimate of the gross turnover of food and drinks processing businesses with turnovers of less than £250,000.

Table 2.17 External sales[1] of the food and drinks processing sector[2,3,4]

£ *million*

	2007	2008	2009	2010	2011	2012 (provisional)
Animal by-products	15	16	18	22	22	25
Bakeries	84	106	102	102	112	110
Beef and sheepmeat	422	612	697	700	829	860
Drinks	173	203	193	209	208	225
Eggs	21	37	49	61	69	65
Fish	51	50	53	55	62	60
Fruit and vegetables	98	106	127	135	146	145
Milk and milk products	505	586	538	611	693	665
Pigmeat	105	118	139	153	150	180
Poultrymeat	408	406	485	539	459	565
Total processing sector	**1,881**	**2,239**	**2,402**	**2,587**	**2,750**	**2,900**

1. The term 'external sales' refers to sales to Great Britain, RoI, foreign countries and intervention.
2. See note 1 Table 2.16.
3. These figures are not comparable with the export statistics published in pre-1996 issues of the *Statistical Review of Northern Ireland Agriculture*.
4. These figures do not include a estimate of the external sales of food and drinks processing businesses with turnovers of less than £250,000.

Table 2.18 Estimated employment in the food and drinks processing sector and input supply sectors

full-time equivalents

	2007	2008	2009	2010	2011	2012 (provisional)
Processing of Products[1,2]						
Animal by-products	142	119	123	115	118	117
Bakeries	3,292	3,374	3,403	3,396	3,209	3,199
Beef and sheepmeat	3,170	3,336	3,532	3,726	3,891	3,942
Drinks	1,258	1,292	1,168	1,168	1,193	1,209
Eggs	211	221	217	228	269	257
Fish	674	604	560	568	558	551
Fruit and vegetables	1,811	1,895	2,007	2,009	2,016	2,042
Milk and milk products	2,320	2,245	2,201	2,201	2,047	2,072
Pigmeat	1,235	1,377	1,392	1,305	1,238	1,264
Poultrymeat	4,350	4,698	5,079	5,262	5,090	5,126
Total processing sector	**18,550**	**19,149**	**19,680**	**19,977**	**19,628**	**19,778**
Manufacture and supply of inputs[3]						
Animal feed	...	...	750	740	740	740
Fertilises and lime	...	...	200	200	200	200
Other requisites (incl. medicines)	...	...	900	910	890	900
Farm machinery (incl. servicing)	...	...	790	740	730	740
Services[4]	...	...	1,150	1,140	1,120	1,130
Total supply sector	**...**	**...**	**3,790**	**3,730**	**3,680**	**3,710**

1. See note 1 Table 2.16.
2. These figures do not include an estimate of employment of food and drinks processing businesses with turnovers of less than £250,000.
3. Estimated from trade directory information and other DARD sources.
4. Includes contractors, veterinary surgeons, works in auction marts, employees of farming and marketing associations and artificial insemination workers.

B. COMMODITIES AND INPUTS

Cattle and calves

The number of clean cattle presented for slaughter in 2013 increased by 6,574 or 2.1 per cent to 319,900 head. The number of slaughtered steers decreased by 7.7 per cent to 130,000 and the number of heifers slaughtered increased by 5.2 per cent. The number of young bulls slaughtered increased by 19 per cent to 68,500. The proportion of steers slaughtered decreased from 45 per cent in 2012 to 41 per cent in 2013, while the proportion of heifers increased from 37 per cent in 2012 to 38 per cent in 2013. The proportion of young bulls slaughtered increased from 18 per cent in 2012 to 21 per cent in 2013.

Average dressed carcase weights in 2013 were 3.8 per cent lower than 2012 levels at 338 kg. In total, the volume of clean beef output decreased by 1.7 per cent to 104,200 tonnes. Average producer price increased by 7.7 per cent to £1,157 per head for clean cattle. The overall result of these changes was that the sales value of finished clean cattle increased by 10 per cent to £370 million.

Sales of culled cows and bulls decreased by 1.1 per cent to 104,380 head in 2013. Average carcase weights for these animals increased by 0.8 per cent to 305 kg. The average price of culled cows and bulls was up by 6.0 per cent on 2012 levels at £785 per head. Overall, total receipts from cull cattle sales, increased by 4.8 per cent to £82 million in 2013.

The number of calves presented for slaughter in 2013 increased by 19 per cent to 6,360 head. An estimated 27,070 calves were exported in 2013, which is 15 per cent higher than 2012 levels. The average calf price was 10 per cent below the 2012 price at £136 per head and the revenue generated amounted to £4.5 million.

The number of store cattle sold outside Northern Ireland increased by 23 per cent to 12,100 head and when combined with a 7.1 per cent increase in average producer price to £762 per head this generated a 32 per cent increase in revenue to £9.2 million. The main market outlet for these store cattle is Great Britain, which accounted for 87 per cent of shipments.

Overall, the value of output of cattle and calves in 2013 (which deducts the value of imported store and breeding cattle but includes breeding cattle exports and store exports) increased by 6.5 per cent to £440 million.

Milk

In 2013, the annual average dairy cow population was 1.3 per cent lower than 2012 at 278,800 head. Average gross milk yield per cow increased during 2013 by 2.3 per cent, to 7,190 litres.

This may be attributable in part to the poor weather conditions in 2012 compared to the improved weather conditions experienced throughout the summer and autumn months of 2013.

The increased milk yield and the reduced cow numbers had a cancelling effect which resulted in no significant change in total output at 1.98 billion litres. The average gross milk price was 21 per cent higher than the 2012 price at 31.68 pence per litre. The rise in average milk price reflects the fact that returns in Northern Ireland are heavily influenced by global commodity markets where prices were higher in 2013.

Overall, the value of output of milk increased in 2013, by £108 million or 21 per cent, to £628 million.

Sheep and lambs

Marketings of clean sheep and lambs decreased by 3.2 per cent in 2013 to 681,600 head. Average dressed carcase weight decreased by 0.9 per cent to 21.3 kg per head. As a result, the volume of clean sheepmeat produced fell by 4.1 per cent to 14,500 tonnes. Clean sheep and lamb producer prices increased by 7.8 per cent, to 387 pence per kg deadweight in 2013. The combined volume and price changes meant that the total market value of clean sheep and lambs increased by 3.3 per cent to £56.2 million.

Marketings of culled ewes and rams decreased, by 8.9 per cent, to 125,800 head. There was a 13 per cent decrease in the price received for these animals. These changes resulted in a fall in the value of market receipts for culled ewes and rams by 21 per cent to £5.2 million.

Overall, the total value of output (which deducts the value of imported sheep but includes breeding sheep and store exports) from the sector decreased by 5.5 per cent, to £58 million.

Pigs

The number of clean pigs marketed during 2013 was 0.6 per cent lower than in 2012 at 1,084,200 head. Average dressed carcase weight was 1.9 per cent higher than 2012 at 83.9 kg. These changes resulted in a 1.3 per cent rise in the quantity of pigmeat produced, to 91,000 tonnes. Pig producer prices increased by 11 per cent to 156 pence per kg deadweight. As a result, output from clean pig production was 13 per cent higher, at £142 million.

Marketings of cull sows and boars were 1.7 per cent lower in 2013 at 12,600 head. The average price per head of cull sows and boars was 5.3 per cent higher than 2012 levels at 90 pence per kg deadweight. These changes resulted in the market returns for these animals increasing by 3.4 per cent per cent to £1.60 million in 2013.

Overall, the value of output from the pig sector increased, by 13 per cent, to £132 million (this figure includes deductions for the value of imported store and breading pigs and additions for the value of breeding and store pig exports).

Poultry

The total volume of poultrymeat production in 2013 was 3.9 per cent higher than 2012 levels at 260,500 tonnes liveweight. Broiler production was 5.7 per cent higher than 2012 levels at 244,000 tonnes liveweight. Broiler producer prices were 6.9 per cent higher than 2012 at 86 pence per kg. Overall, the market value of broilers was 13 per cent higher than 2012 values at £210 million. Broilers account for 81 per cent of the total market value of the poultry sector.

Turkey production decreased in 2013, by 17 per cent, to 13,200 tonnes liveweight.

The value of output from the poultry sector in 2013 was 6.8 per cent higher than 2012, at £257 million.

Eggs

Packing station throughput of graded eggs was estimated at 88 million dozen eggs in 2013. This was a rise of 9.9 per cent on 2012 levels. The proportion of throughput attributed to free range management systems increased from 51 per cent in 2012 to 53 per cent in 2013 with the remaining 47 per cent of eggs originating from intensively managed systems.

The average producer price of eggs decreased, by 7.3 per cent, to 75 pence per dozen. The overall value of egg output therefore increased, by 2.2 per cent, to £67 million (this figure includes eggs for processing, unrecorded sales for human consumption and duck eggs).

Potatoes

In 2013, the area of potatoes planted increased by 6.9 per cent to 4,400 hectares. The average yield increased, by 1.7 per cent, to 40 tonnes per hectare. Consequently, the total quantity of potatoes harvested was 8.8 per cent higher at 178,000 tonnes.

Marketings of ware potatoes in 2013 were 19 per cent lower at 110,500 tonnes. Sales in the first half of the 2013 calendar year were 45 per cent lower than 2012 and there was a 3.6 per cent increase during the second half of the year when compared with the equivalent periods in 2012. Sales in the first six months of 2013 were almost exclusively from the 2012 harvest, while sales in the last six months of 2013 were mainly from the 2013 harvest.

In 2013, the volume of seed potato output (including home-saved seed) was 11 per cent higher than 2012 at 18,300 tonnes. In total for 2013, the volume of potato output (including ware, seed and stockfeed potatoes) was 153,800 tonnes. This was a 13 per cent decrease on 2012 sales levels.

The average price of ware potatoes in 2013 was £196 per tonne, which was 28 per cent higher than in 2012. The average price of seed potatoes was 35 per cent higher than 2012 at £211 per tonne. The total value of potato output increased in 2013, by 27 per cent, to £25 million.

Cereals

In 2013, spring barley yields were up by 7.7 per cent, while winter barley yields were up by 14 per cent. The area of spring barley increased by 1.4 per cent to 20,500 hectares, and winter barley decreased by 1.1 per cent to 5,300 hectares. As a consequence, production of spring barley increased by 9.1 per cent, while winter barley increased by 12 per cent. Overall, total barley production was 9.9 per cent higher than 2012 levels at 139,800 tonnes, whilst the total area of barley grown was 0.9 per cent higher at 25,800 hectares.

The total volume of barley sold or used on-farm in 2013 was 2.3 per cent higher at 137,200 tonnes. The average producer price of barley decreased, by 8.3 per cent, to £180 per tonne. These changes and a positive stock change resulted in the value of barley output being relatively consistent with 2012 levels at £25 million.

In 2013, the area of wheat grown was 15 per cent lower than 2012 at 8,000 hectares and when coupled with a 22 per cent increase in yield, resulted in a 3.7 per cent increase in production to 58,300 tonnes.

The volume of wheat sold or used on-farm in 2013 decreased by 18 per cent to 58,700 tonnes, while the price of wheat decreased by 3.8 per cent to £195 per tonne. These changes and a negative stock change contributed to the value of wheat output decreasing by 3.6 per cent to £11 million.

The area of oats grown rose by 5.0 per cent to 2,000 hectares and when coupled with a 5.2 per cent increase in yield, resulted in a 10 per cent increase in production to 9,900. The average producer price of oats was 7.7 per cent lower at £191 per tonne. The changes in price and production resulted in the value of output falling by 1.3 per cent, to £1.9 million.

Horticulture

The total value of horticultural output in 2013 increased by 7.2 per cent to £71 million. The market value of fruit (mainly apples) increased by 14 per cent to £10 million. Apple production fell by 17 per cent to 33,500 tonnes while prices increased by 39 per cent from 2012 levels. Overall, the market value of apples increased by 16 per cent. The value of output from mushrooms increased by 8.0 per cent to £31 million, while receipts from the sale of vegetables increased by 22 per cent to £18 million. The output value of ornamental and hardy nursery stock increased by 26.8 per cent to £12 million.

Feedstuffs

The total volume of all compound feedstuffs purchased during 2013 was 5.0 per higher than 2012 levels at 2.19 million tonnes. Within this total, the purchased volumes of all cattle (and calf) compounds increased by 6.9 percent, while there was a 5.2 per cent increase in purchases of dairy compounds and a 14 per cent increase in beef cattle compounds. The volume of sheep compounds purchased increased by 7.7 per cent while purchases of pig compound decreased by 4.2 per cent. Total purchases of poultry compounds increased in 2013 by 3.3 per cent.

Inputs of straights (including home-fed cereals) decreased by 2.1 per cent in 2013 to 378,000 tonnes. In total, the volume of all feed purchased was 4.4 per cent higher than 2012 levels at 2.6 million tonnes. The average price of feedstuffs (compounds and home-fed cereals) increased, by 6.4 per cent, to £306 per tonne in 2013. Overall, the cost of purchased feedstuffs increased by 11 per cent to £800 million.

Due to the shortage of fodder on farms in 2013, the Department operated a fodder transport scheme to assist with the import costs. Under the scheme 16,300 tonnes of fodder were imported at a cost to farmers of approximately £1.9 million.

Fertilisers and lime

The quantity of fertilisers purchased in 2013 increased by 24 per cent to 327,800 tonnes and the average price decreased by 1.4 per cent to £308 per tonne. In volume terms, 38 per cent of total fertiliser sales were straights, while 62 per cent were compounds.

As a result of the increase in quantity purchased, the total value of fertiliser purchases increased, by 23 per cent, to £99.6 million.

Total expenditure on lime increased by 8.8 per cent when compared to 2012 levels at £1.6 million. The quantity purchased increased by 4.1 per cent, while the price increased by 4.5 per cent.

Marketing

Total marketing expenses in 2013 were 20 per cent higher than 2012 levels at £42.6 million. Cattle marketing expenses were £259 million, while sheep expenses were £3.7 million. Marketing expenses for milk were £8.9 million, while those for pigs were £4.9 million.

Machinery expenses

In 2013, machinery expenses increased, by 1.1 per cent, to £153 million. This increase was driven mainly by a 3.5 per cent rise in machinery repair costs which was partially offset by a 0.5 per cent reduction in fuel and oil expenditure.

Interest

Total borrowings for farming purposes in 2013 were broadly consistent with 2012. The average cost of borrowing is estimated to have remained broadly consistent with 2012 levels at 4.5 per cent. As a result, the total interest bill (including FISIM) remained consistent with 2012 at £37.0 million.

Financial intermediaries (mainly banks) charge explicit commissions and fees for their services to customers, as well as implicit ones by paying and charging different rates of interest to borrowers and lenders. The revenue from the margin on lending and borrowing by financial intermediaries is described as financial intermediation services indirectly measured (FISIM). The inclusion of FISIM in the account is in line with recommended EU national accounting conventions. It is a reallocation to gross output of part of the interest paid by farmers. While the inclusion of FISIM will increase intermediate consumption and decrease gross value added, it will decrease, by the same amount, the figure shown for interest paid and consequently this change in methodology has no impact on total income from farming.

Labour

In 2013, the volume of paid labour input (excluding labour used on capital projects) was 1.0% higher than 2012 levels, at 8.6 million hours, while paid labour costs were broadly comparable with 2012, at £67 million. This was due to an increase in the volume of paid labour and a decrease in the average full time earnings (£ per hour).

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Table 2.19 Output of cattle and calves

	2008	2009	2010	2011	2012	2013 (provisional)
Steers, heifers and young bulls						
Sales ('000 head)	339.3	342.6	353.7	331.1	313.3	319.9
Average producer price (p per kg dwt)[1,2]	248.3	261.4	255.4	292.3	317.4	355.3
Average dressed carcase weight (kg)[2,3]	331.0	330.6	329.6	334.4	338.4	325.7
Quantity of output ('000 tonnes)[2,3]	112.3	113.3	116.6	110.7	106.0	104.2
Value of output (£m)	278.9	296.1	297.7	323.6	336.6	370.2
Cows and bulls						
Sales (inc. OCDS) ('000 head)	104.3	91.2	92.2	96.6	105.6	104.4
Average producer price (p per kg dwt)[1,2]	188.9	196.8	195.2	229.1	244.4	257.1
Average dressed carcase weight (kg)[2,3]	311.1	307.4	316.2	311.9	302.8	305.2
Quantity of output ('000 tonnes)[2,3]	26.4	28.0	29.1	30.1	32.0	31.9
Value of output (inc. OCDS) (£m)	54.3	55.2	56.9	69.0	78.1	81.9
Calves						
Sales ('000 head)	16.0	10.4	21.5	29.4	28.9	33.4
Average producer price (£ per head)[1]	117	117	132	153	152	136
Value of output (£m)	1.9	1.2	2.9	4.5	4.4	4.6
Store cattle sold outside Northern Ireland						
Marketings ('000 head)	8.0	8.6	7.6	6.2	9.9	12.1
Average producer price (£ per head)[1]	533	580	607	668	771	762
Value of output (£m)	4.3	5.0	4.6	4.1	7.0	9.2
Breeding cattle sold outside Northern Ireland						
Marketings ('000 head)	1.5	1.5	1.0	1.1	2.2	2.8
Average producer price (£ per head)	1,091	959	1,141	1,325	1,198	1,178
Value of output (£m)	1.6	1.4	1.1	1.5	2.6	3.2
Less Imported cattle						
Marketings ('000 head)	23.1	47.1	64.2	35.8	30.2	23.7
Average producer price (£ per head)	682	629	650	851	886	980
Value of output (£m)	15.8	29.6	41.7	30.5	26.8	23.3
Total Market Value (£m)	**325.2**	**329.3**	**321.5**	**372.3**	**402.0**	**445.9**
Other receipts (£m)	-	-	-	-	-	-
Stock change due to volume (£m)	-1.7	+0.2	-7.5	-20.5	+11.1	-5.8
Total value of output (£m)	**323.4**	**329.5**	**314.0**	**351.8**	**413.1**	**440.1**
Net receipts from non-food outlets (included above)						
Older Cattle Disposal Scheme (£m)	4.5	-	-	-	-	

1. Average realised return gross of marketing expenses for cattle for human consumption. Excludes animals to the Older Cattle Disposal Scheme.
2. See note 2 Table 2.6.
3. Excluding animals sold under the Older Cattle Disposal Scheme.

Table 2.20 Sources of home-fed finished cattle marketed[1]

per cent

	2008	2009	2010	2011	2012	2013 (provisional)
Cows and bulls	23	21	21	23	25	24
Steers and heifers originating from:						
- the dairy herd;	33	36	35	33	33	32
- the beef herd;	38	38	35	32	35	38
- calves and stores imported from the Republic of Ireland or shipped from Great Britain	6	5	9	13	7	6
Total[2]	**100**	**100**	**100**	**100**	**100**	**100**
Total number marketed ('000 head)	**444**	**434**	**446**	**428**	**419**	**422**

1. Includes cattle slaughtered under the Older Cattle Disposal Scheme.
2. Individual items may not add to 100 due to roundings.

Table 2.21 Output of milk

	2008	2009	2010	2011	2012	2013 (provisional)
Annual average number of dairy cows ('000 head)	288.6	282.8	279.3	281.2	282.5	278.8
Average gross yield per cow (to nearest 10 litres per annum)[1]	6,710	6,380	6,740	7,110	7,030	7,190
Total output of milk for human consumption (million litres)	1,906	1,775	1,852	1,966	1,983	1,981
of which:						
sales off farms	1,903	1,772	1,849	1,964	1,981	1,979
used in farm households	3	3	2	2	2	2
Average producer price (pence per litre)						
Gross price[2]	23.32	19.88	25.42	27.65	26.22	31.68
Net price[3]	22.91	19.48	25.03	27.26	25.72	31.33
Market Value (£m)	**445.0**	**353.8**	**470.7**	**543.7**	**519.7**	**627.5**
Value of output (£m)[2]	**445.0**	**353.8**	**470.7**	**543.7**	**519.7**	**627.5**

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.

Table 2.22 Output of sheep

	2008	2009	2010	2011	2012	2013 (provisional)
Marketings ('000 head)[1]						
Finished sheep and lambs	724.4	733.1	657.3	595.8	704.1	681.6
Culled ewes and rams	137.8	125.0	110.8	97.7	138.1	125.8
Average price (p per kg deadweight)[2]						
Finished sheep and lambs	291.4	332.2	372.0	407.4	359.2	387.1
Average dressed carcase weight (kg)						
Finished sheep and lambs	21.0	21.4	21.6	21.7	21.5	21.3
Quantity of Output ('000 tonnes)						
Finished sheep and lambs	15.2	15.7	14.2	12.9	15.1	14.5
Culled ewes and rams	3.6	3.4	3.1	2.7	3.8	3.4
Market Value (£m)[3]	**46.3**	**57.1**	**56.8**	**55.2**	**58.0**	**58.9**
Stock change due to volume (£m)	+3.5	-2.8	+3.3	-1.6	+3.6	-0.8
Value of output (£m)	**49.9**	**54.3**	**60.1**	**53.5**	**61.5**	**58.2**

1. Estimated home-produced marketings, including unrecorded exports.
2. Average realised return gross of marketing expenses.
3. Includes breeding and store sheep exported less all sheep imported.

Table 2.23 Output of pigs

	2008	2009	2010	2011	2012	2013 (provisional)
Marketings ('000 head)[1]						
Finished clean pigs	855.5	869.2	966.4	1,027.5	1,090.4	1,084.2
Culled sows and boars	10.6	11.8	12.8	12.7	12.8	12.6
Average price (p per kg deadweight)[2]						
Finished clean pigs	116.10	133.44	127.71	134.07	140.21	155.81
Culled sows and boars	94.54	96.84	82.48	85.87	85.60	90.12
Average dressed carcase weight (kg)						
Finished clean pigs	80.1	82.7	82.2	82.3	82.4	83.9
Quantity of output ('000 tonnes)						
Finished clean pigs	68.5	71.9	79.4	84.5	89.8	91.0
Culled sows and boars	1.6	1.7	1.8	1.8	1.8	1.8
Market Value (£m)[3]	**76.2**	**91.9**	**95.2**	**105.9**	**116.3**	**132.5**
Stock change due to volume (£m)	+0.7	-0.2	-0.1	+0.1	+0.4	-0.0
Value of output (£m)	**76.8**	**91.7**	**95.1**	**106.0**	**116.7**	**132.5**

1. Estimated home-produced marketings, including unrecorded exports.
2. Average realised return gross of marketing expenses.
3. Includes breeding and store pigs exported less all pigs imported.

Table 2.24 Output of poultry

	2008	2009	2010	2011	2012	2013 (provisional)
Poultrymeat production ('000 tonnes liveweight)						
All poultrymeat (including broilers)	242.4	256.6	266.5	260.0	259.5	269.5
Broilers	221.7	233.8	241.6	231.8	230.8	244.0
Average producer price (p per kg liveweight)						
All poultrymeat (including broilers)	65.6	69.9	71.4	81.7	81.2	85.8
Broilers	66.6	70.8	71.6	80.3	80.4	86.0
Market value						
All poultry (£m)	182.9	201.7	215.9	242.4	239.9	257.4
of which broilers	147.6	165.6	173.0	186.1	185.6	209.8
Stock change due to volume (£m)	-0.6	+0.8	+2.0	-0.5	+0.7	-0.6
Value of Output (£m)[1]	**182.3**	**202.5**	**217.9**	**241.8**	**240.6**	**256.9**

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

Table 2.25 Output of eggs

	2008	2009	2010	2011	2012	2013 (provisional)
Graded packing station throughput (million dozen)	59.8	62.7	79.2	81.2	79.7	87.7
Average producer price (p per dozen)[1]	57.57	68.28	65.37	68.49	80.80	74.95
Value of output (£m)[2]	**35.2**	**43.8**	**52.6**	**56.6**	**65.6**	**67.0**

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

Table 2.26 Crop production

harvest years

	2008	2009	2010	2011	2012	2013 (provisional)
Potatoes[1]						
Area ('000 hectares)	5.1	5.1	4.9	4.8	4.2	4.4
Harvestable yield (tonnes per hectare)	36.5	39.9	42.0	45.5	39.4	40.1
Production ('000 tonnes)	185.9	203.3	207.2	219.8	163.6	178.0
of which:						
saleable potatoes	160.7	173.8	181.2	194.7	135.5	154.3
chats[2] and waste	25.2	29.6	26.0	25.1	28.1	23.8
Barley[3,4]						
Area ('000 hectares)	25.7	26.7	24.3	24.0	25.5	27.8
Yield (tonnes per hectare)	5.11	5.22	5.72	5.73	4.98	5.43
Production ('000 tonnes)	131.2	139.7	139.2	137.9	127.2	139.8
Wheat[4]						
Area ('000 hectares)	12.1	10.1	10.9	11.6	9.4	8.0
Yield (tonnes per hectare)	7.92	7.23	8.18	7.77	5.98	7.32
Production ('000 tonnes)	95.8	73.2	89.1	89.9	56.2	58.3
Oats[3,4]						
Area ('000 hectares)	2.4	2.1	2.3	2.1	1.9	2.0
Yield (tonnes per hectare)	4.5	5.39	5.78	6.02	4.77	5.02
Production ('000 tonnes)	10.9	11.1	13.5	12.6	9.0	9.9
Oilseed rape[5]						
Area ('000 hectares)	0.4	0.6	0.4	0.6	0.8	0.5
Yield (tonnes per hectare)	3.30	3.40	3.50	3.90	3.40	2.98
Production ('000 tonnes)	1.5	2.1	1.6	2.3	2.7	1.4
Hay						
Area ('000 hectares)	12.4	11.4	13.0	13.8	9.7	19.6
Yield (tonnes per hectare)	8.36	9.54	9.50	8.30	8.27	7.31
Production ('000 tonnes)	104.1	108.9	124.0	114.0	79.9	143.2
Grass silage						
Area ('000 hectares)	275.5	287.5	306.9	287.5	275.2	290.6
Yield (tonnes per hectare)	30.76	31.15	29.95	31.10	29.69	31.20
Production ('000 tonnes)	8,476.3	8,957.0	9,191.0	8,946.0	8,170.8	9,069.7

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. Yield and production estimates are standardised to 9% moisture content.

Table 2.27 Output[1] of potatoes, barley and wheat

	2008	2009	2010	2011	2012	2013 (provisional)
POTATOES[2]						
Quantity of output ('000 tonnes)						
Ware	126.3	133.2	139.4	155.2	136.3	110.5
Seed	22.7	21.0	19.8	19.9	16.5	18.4
Stockfeed	22.8	24.4	24.0	24.3	24.3	25.0
Total	**171.8**	**178.5**	**183.3**	**199.4**	**162.2**	**153.8**
Average producer price (£ per tonne)						
Ware	130.19	128.89	130.45	122.47	155.58	196.17
Seed	170.97	175.74	171.16	172.13	156.29	210.55
Market Value (£m)						
Ware	16.4	17.2	18.2	19.0	21.2	21.9
Seed	3.9	3.7	3.4	3.4	2.6	3.9
Stockfeed	0.4	0.3	0.4	0.4	0.6	0.6
Total[3]	**20.6**	**21.2**	**22.0**	**22.8**	**24.3**	**26.2**
Stock change due to volume (£m)	-0.1	+0.3	+0.9	+2.8	-4.9	-1.7
Value of output (£m)	**20.5**	**21.4**	**22.8**	**25.6**	**19.4**	**24.6**
BARLEY[4]						
Quantity of output ('000 tonnes)	126.7	134.4	137.7	137.3	134.1	137.2
Average producer price (£ per tonne)	145.38	110.77	135.14	178.94	195.76	179.58
Market Value (£m)	18.4	14.9	18.6	24.6	26.3	24.6
Stock change due to volume (£m)	+0.6	+0.6	+0.2	+0.1	-1.2	+0.4
Value of output (£m)	**19.0**	**15.4**	**18.8**	**24.7**	**25.1**	**25.1**
WHEAT[4]						
Quantity of output ('000 tonnes)	83.9	80.2	81.1	89.7	71.8	58.7
Average producer price (£ per tonne)	144.75	120.71	151.73	191.10	203.08	195.27
Market Value (£m)	12.1	9.7	12.3	17.1	14.6	11.5
Stock change due to volume (£m)	+1.5	-0.8	+1.4	+0.0	-2.7	-0.1
Value of output (£m)	**13.7**	**8.9**	**13.7**	**17.2**	**11.8**	**11.4**

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. Net of inspection fees.
4. Includes cereals retained on the farm of origin or sold farm-to-farm.

Table 2.28 Output of apples and mushrooms

	2008	2009	2010	2011	2012	2013 (provisional)
APPLES[1]						
Quantity of output ('000 tonnes)	54.8	37.8	42.0	47.9	40.4	33.5
Average producer price (£ per tonne)	148	152	137	133	183	255
Market value (£m)	8.1	5.8	5.7	6.4	7.4	8.6
Stock change due to volume (£m)	+0.9	-1.7	+0.6	+0.4	-2.8	+0.5
Value of Output (£m)	**8.9**	**4.0**	**6.3**	**6.8**	**4.6**	**9.0**
MUSHROOMS						
Quantity of output ('000 tonnes)	18.2	16.4	16.3	17.7	20.1	22.0
Average producer price (£ per tonne)	1,232	1,213	1,210	1,390	1,410	1,390
Value of output (£m)	**22.4**	**19.9**	**19.7**	**24.7**	**28.3**	**30.6**

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

Table 2.29 Quantity and cost of the main items of expenditure (including interest and labour)

	2008	2009	2010	2011	2012	2013 (provisional)
FEEDSTUFFS[1]						
Quantity purchased ('000 tonnes concentrate equivalent)	2,255	2,368	2,453	2,402	2,497	2,608
Average cost (£ per tonne concentrate equivalent)	232	225	237	271	288	306
Value of feed consumed (£m)	**522.0**	**535.9**	**583.9**	**647.6**	**719.2**	**800.3**
of which:						
stock change due to volume	-0.2	+2.2	+2.1	-3.1	+0.1	+1.5
FERTILISERS						
Quantity purchased ('000 tonnes product)	285	214	302	247	264	328
Nutrient content ('000 tonnes)	93	69	101	79	88	106
of which:						
Nitrogen	74	56	80	63	70	81
Phosphate	6	5	7	6	6	9
Potash	13	8	13	11	12	16
Average cost (£ per tonne of nutrient)	291	244	238	316	308	304
Value of purchases (£m)	**83.1**	**52.2**	**72.1**	**78.2**	**81.3**	**99.6**
LIME						
Quantity purchased ('000 tonnes)	83	103	160	159	129	135
Average cost (£ per tonne)	9.78	10.18	10.84	10.73	11.26	11.72
Value of purchases (£m)	**0.8**	**1.1**	**1.7**	**1.7**	**1.5**	**1.6**
MARKETING EXPENSES[2]						
Cattle	19.3	20.1	20.2	19.9	20.6	25.2
Sheep	3.5	3.5	3.2	3.3	3.1	3.7
Pigs	2.7	2.8	3.4	4.3	4.3	4.9
Milk	7.8	7.1	7.1	7.6	7.6	8.9
Total	**33.4**	**33.5**	**33.8**	**35.1**	**35.5**	**42.6**
INTEREST						
Bank base lending rate (%)	4.7	0.6	0.5	0.5	0.5	0.5
Total interest charges (£m)[3]	**53.8**	**40.7**	**38.6**	**36.7**	**36.9**	**37.0**
LABOUR						
Average weekly hours of full-time paid male workers	39.90	40.64	40.02	41.40	40.79	41.55
Average earnings of full-time paid male workers (£ per hour)[4]	6.87	7.50	7.40	7.48	7.58	7.46
Average earnings of full-time paid male workers (£ per week)[4]	274.11	304.80	296.15	309.67	309.19	309.96
Volume of paid labour (million hours)[5]	7.44	7.31	7.46	8.06	8.53	8.62
Value of paid labour (£m)[5]	**53.5**	**54.8**	**54.9**	**60.2**	**67.1**	**67.2**

1. Includes home-fed cereals, proteins, forage crops, hay 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. Includes FISIM (See Page 28 for an explanation of FISIM).
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

Approximately 75 per cent of the total Northern Ireland land area of 1.35 million hectares is used for agriculture, including common rough grazing. A further 8.2 per cent is used for forestry (Table 3.1). The greater part of the total forested area (111,000 hectares) is managed by the Forest Service of the Department of Agriculture and Rural Development (see *Forest Service Annual Report, 2012/2013*[1]).

Most farmland in Northern Ireland is under grass. Only 3,711 farms (15 per cent) have arable or horticultural crops.These crops occupy 51,600 hectares and make up only 5.2 per cent of the total area farmed.Barley (25,800 hectares) is the main crop grown followed by wheat with 8,000 hectares. The total area of cereals grown (35,900 hectares) was 3.1 per cent lower in 2013 than in 2012, but within the range of values experienced over the last 10 years, when the area planted in cereals has varied from a low of 33,600 hectares (2006) to a high of 40,400 hectares (2008). Weather has a significant impact on year on year fluctuations in the area grown, especially as it affects ground conditions in the autumn when winter wheat and winter barley crops are sown. In 2013, the total area of potatoes grown was little changed on the previous year at 4,300 hectares. However, over the 10 year period 2003 to 2013, the area in potatoes decreased by 30 per cent. Potatoes are an expensive crop to produce, while market returns are variable. In 2013, the cropped area also included 3,000 hectares of horticultural crops, mainly apple orchards (1,500 hectares) and vegetables (1,400 hectares).

Grazing livestock

All but 7.0 per cent of Northern Ireland farms keep cattle or sheep. In 2012, cattle were present on 20,201 farms (82 per cent), sheep on 8,852 farms (36 per cent) and cattle and/or sheep on 22,777 farms (93 per cent).

The total number of cattle on farms at the time of the June 2013 Agricultural Census, was just under 1.6 million, a 2.3 per cent fall on the previous year. There were 279,500 dairy cows (2.1 per cent less than in 2012), and 270,100 beef cows (3.3 per cent less than in 2012). The total cattle populations peaked in 1998 at 1.8 million before gradually falling to a low of just under 1.6 million in 2009. Since then the total numbers remained relatively stable.

In June 2013, the sheep breeding flock was 1.7 per cent smaller than in 2012 with 921,400 ewes. This reverse was the first dip in

1 Available on the DARD website at http://www.dardni.gov.uk/forestry

numbers since 2010 when numbers had reached a 15 year low of 875,900 ewes. Including lambs and other sheep the entire flock totalled 1.9 million in 2013.

Intensive livestock

In Northern Ireland, pigs and/or poultry (for commercial purposes) are present on 4.7 per cent of farms.

In 2013, pig numbers were derived from the NI Annual Pig Inventory (conducted in June) and were estimated at 480,300. There was a fall in the number of farms with commercial pig herds but this was mainly due to the change in methodology which makes a distinction between commercial producers and other keepers of pigs (for details see 'The Agricultural Census in Northern Ireland: Results for June 2013'). Sow numbers increased to 42,500 in 2013, primarily as a result of improving market conditions.

In June 2013, the Northern Ireland poultry flock was recorded at 19.4 million birds, 1.0 per cent higher than in 2012. The number of laying birds (2.4 million) decreased by 4.6 per cent in 2013, while the numbers of broilers (13.4 million) showed little change. Poultry production is a highly vertically integrated sector in Northern Ireland and production is managed in response to market conditions and business objectives.

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) and livestock farming predominates. Crops occupy 13 per cent of land on lowland farms compared with only 1.8 per cent in the case of LFA farms. There are also significant differences in the patterns of livestock farming. Beef cows (206,000) predominate on **LFA farms**, where they are more important than dairy cows (136,000), whereas, on **lowland farms**, there were 64,000 beef cows and 144,000 dairy cows in 2013. **LFA farms** account for 38 and 65 per cent of the Northern Ireland's pigs and poultry, respectively.

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Table 3.1 Land use, 2013

thousand hectares

	Crops	Grass and rough grazing	Woodland	Other land	Total land area
Farms	52	928	10	8	**998**
Common grazing	-	35	-	-	**35**
NI Forest Service[1]	-	-	62	12	**74**
Other areas	-	-	39	205	**244**
All land[2]	**52**	**963**	**111**	**225**	**1,351**

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

2. Land area, excluding significant areas of inland water.

Table 3.2 Areas of crops, grass, rough grazing and other land, June 2008 - 2013

thousand hectares

	2008	2009	2010	2011	2012	2013
Oats	2.4	2.1	2.3	2.1	1.9	2.0
Wheat	12.1	10.1	10.9	11.6	9.4	8.0
Barley: Winter	6.1	5.1	6.8	6.8	5.3	5.3
Spring	19.5	21.6	17.6	17.2	20.2	20.5
Mixed corn	0.2	0.3	0.2	0.2	0.3	0.2
Potatoes	5.1	5.1	4.9	4.8	4.2	4.3
Arable crop silage	3.2	3.5	3.9	3.3	3.7	4.1
Other field crops	6.6	6.9	6.1	5.4	5.2	4.2
Total agricultural crops	**55.4**	**54.8**	**52.6**	**51.4**	**50.1**	**48.6**
Fruit	1.5	1.5	1.5	1.5	1.5	1.5
Vegetables	1.4	1.4	1.3	1.3	1.3	1.4
Other horticultural crops	0.1	0.1	0.1	0.1	0.1	0.1
Total horticultural crops	**3.0**	**3.0**	**2.9**	**3.0**	**2.9**	**3.0**
Grass: Under 5 years old	117.2	120.8	118.4	129.7	133.9	139.2
5 years old and over	672.4	669.9	661.6	647.4	646.0	648.8
Total grass	**789.6**	**790.7**	**780.0**	**777.1**	**779.8**	**788.0**
Total crops and grass	**848.0**	**848.4**	**835.5**	**831.5**	**832.8**	**839.6**
Rough grazing[1]	147.1	141.9	140.5	140.9	138.8	140.1
Woods and plantation	9.9	10.3	10.2	10.8	11.0	10.3
Other land[2]	12.4	7.4	7.8	8.2	8.3	8.0
Total area of farms	**1,017.4**	**1,008.0**	**994.0**	**991.4**	**991.0**	**998.0**

1. Excludes common rough grazing (35,407 ha in 2013).

2. Includes set aside and land not used for agriculture.

Table 3.3 Livestock numbers, June 2008 - 2013

thousand head

	2008	2009	2010	2011	2012	2013
CATTLE[1]						
Dairy cows	**289.2**	**284.7**	**281.0**	**282.5**	**285.4**	**279.5**
Dairy heifers in calf	64.3	62.5	61.9	62.3	65.4	67.1
Beef cows	**265.7**	**256.8**	**257.6**	**269.5**	**279.2**	**270.1**
Beef heifers in calf	39.7	37.6	38.4	42.1	40.9	37.4
Total cows	**554.9**	**541.5**	**538.7**	**552.0**	**564.6**	**549.6**
Total heifers in calf	**104.0**	**100.1**	**100.3**	**104.4**	**106.3**	**104.5**
Bulls for service	19.6	18.6	18.4	18.7	19.0	18.8
Other cattle						
Over 2 years	151.5	132.0	133.6	123.7	117.2	113.3
1-2 years	333.5	348.6	354.2	338.7	334.5	345.2
Under 1 year	459.0	458.4	459.1	452.9	483.9	456.3
Total cattle	**1,622.5**	**1,599.0**	**1,604.4**	**1,590.5**	**1,625.4**	**1,587.8**
SHEEP						
Breeding ewes	935.4	892.4	875.9	895.2	937.5	921.4
Other sheep	1,038.2	1,004.3	971.8	992.4	1,031.4	982.1
Total sheep	**1,973.6**	**1,896.7**	**1,847.7**	**1,887.6**	**1,968.9**	**1,903.5**
PIGS[2]						
Sows and gilts	35.5	38.2	38.5	38.0	38.3	42.5
Other pigs	366.9	395.4	386.1	387.2	388.6	437.8
Total pigs	**402.4**	**433.5**	**424.6**	**425.3**	**426.9**	**480.3**
POULTRY[3]						
Laying birds	2,398.5	2,315.7	2,099.4	2,429.7	2,556.7	2,438.4
Growing pullets	1,174.3	999.1	1,017.3	1,109.2	1,089.2	909.3
Breeding flock	1,205.2	1,573.2	1,078.2	1,528.0	1,641.1	2,150.6
Table chickens	11,543.5	11,418.3	11,915.1	14,069.4	13,459.4	13,412.0
Total ordinary fowl	**16,321.4**	**16,306.3**	**16,109.9**	**19,136.3**	**18,746.4**	**18,910.4**
Other poultry	809.4	556.4	421.2	486.2	441.7	463.5
Total poultry	**17,130.9**	**16,862.7**	**16,531.1**	**19,622.5**	**19,188.2**	**19,373.8**
HORSES & PONIES[4]	**11.8**	**12.2**	**12.5**	**12.0**	**12.0**	**11.7**
GOATS	**2.8**	**2.7**	**2.9**	**3.1**	**3.1**	**3.2**

1. From 2005 onwards, cattle figures were derived from APHIS.
2. From 2013 onwards, pig figures sourced from the Northern Ireland Annual Inventory of Pigs
2. From 2007 onwards, poultry figures were taken from the Northern Ireland Bird Register Update.
4. Horses and ponies on agricultural holdings.

Table 3.4 Areas of crops, grass, rough grazing and other land by Less Favoured Area (LFA) category[1] of farm, June 2013

thousand hectares

	Areas on farms wholly or mainly in:				
	Severely Disadvantaged Area (SDA)	**Disadvantaged Area (DA)**	**Total LFA**	**Non LFA**	**LFA as % NI**
Cereals	2	5	8	28	22
Potatoes	1	1	1	3	28
Other agricultural crops	1	2	3	6	32
Horticultural crops	0	0	1	2	18
Total crops	**4**	**8**	**12**	**39**	**24**
Grass: Under 5 years old	46	39	85	55	61
5 years and over	267	187	455	194	70
Total grass	**313**	**226**	**539**	**249**	**68**
Rough grazing[2]	123	11	134	6	96
Woods/other land	7	6	13	6	69
Total area	**447**	**251**	**698**	**300**	**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 2013

thousand head

	Numbers on farms wholly or mainly in:				
	Severely Disadvantaged Area (SDA)	**Disadvantaged Area (DA)**	**Total LFA**	**Non LFA**	**LFA as % NI**
CATTLE					
Dairy cows	45	91	136	144	49
Beef cows	127	79	206	64	76
Heifers in calf	26	33	59	45	57
Bulls for service	7	6	13	6	67
Other cattle					
Over 2 years	25	38	63	51	55
1-2 years	82	115	197	148	57
Under 1 year	143	143	286	170	63
Total cattle	**456**	**504**	**960**	**628**	**60**
SHEEP					
Breeding ewes	530	206	736	186	80
Other sheep	543	232	775	207	79
Total sheep	**1,073**	**437**	**1,511**	**393**	**79**
PIGS					
Sows and gilts	6	11	17	26	39
Other pigs	53	114	167	271	38
Total pigs	**58**	**125**	**183**	**297**	**38**
POULTRY					
Laying birds	1,057	685	1,742	697	71
Table fowl	3,241	5,373	8,614	4,798	64
Other poultry	990	1,229	2,219	1,304	63
Total poultry	**5,288**	**7,287**	**12,575**	**6,799**	**65**
HORSES AND PONIES[2]	**3**	**3**	**6**	**6**	**52**
GOATS	**1**	**1**	**2**	**1**	**68**

1. See Note 1, Table 3.4.
2. See Note 3, Table 3.3.

4. FARM STRUCTURE

Methodological Notes

In the Northern Ireland 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 where a higher minimum size threshold is applied.

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 2013 Census, 24,503, was 218 higher than in 2012. This is a net change, with some new businesses being created (often as off-shoots from existing farms) and others merging or ceasing to be active. For many years, there has been a general downward trend in total numbers of 1.5 per cent (with some increases or decreases for individual farm types). However, 2013 saw small increases in most farm types with grassland only farms (captured within the ‘general cropping’ type) showing the greatest change (table 4.7). These had little or no livestock, but reported either an intention to restock or to produce fodder for sale. The increase in farm numbers may be linked to a desire to demonstrate increased farming activity.

Almost a quarter of all farms have less than 10 hectares of crops and grass while some 1,300 farms (5.5 per cent) have 100 hectares or more; the latter occupy one quarter of the total area of crops and grass.

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 variable, area alone does not accurately reflect the level of business activity on farms. To overcome this problem Standard Outputs (SO) 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 SO. 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 is based on the SO approach, from 2004 onwards, farm size has been determined by Standard Labour Requirements (SLR) for farms (see appendix). The system applies across the UK, but 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 the classification is based on underlying total SLR values.

The majority of farm businesses in Northern Ireland, 76 per cent in 2013, are classified as **very small**. In 2013, there were 18,719 farms in this category (Table 4.3) which is slightly higher than the 2012 figure. These farms are unlikely to provide full time employment or an adequate income solely from farming activities.[1] They contribute 24 per cent of the industry's total SO but account for 49 per cent of the farmed area (Table 4.15). The main activities of these farms are cattle and sheep rearing. In 2013, 60 per cent of beef cows and half of total sheep were to be found on very small farms. Approximately 30,900 persons are engaged in the work of these farms (Table 4.13).

There were 3,063 **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, for example accounting for 27 per cent of poultry and 28 per cent of total sheep activities; they cover 21 per cent of the agricultural area and involve one fifth of the full time agricultural labour force (Table 4.15).

The 1,187 **medium** and 1,534 **large** farms (together representing 11 per cent of all farms) contribute 57 per cent of the total SO from under a third (30 per cent) of the land area (Table 4.15). These farms dominate the dairy, pigs and poultry layer sectors with 80, 89 and 64 per cent shares of the livestock numbers, respectively.

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 55 and 45 per cent, respectively (Table 4.5).

Farm type

Eighty-eight per cent of Northern Ireland farms derive two-thirds or more of their total SO from grazing livestock (Table 4.6), including 11 per cent classified as **dairy** farms and 77 per cent as **cattle and sheep**. Relatively few farms depend predominantly on cropping with 300 (1.2 per cent) classified as **cereal** farms, 508 (2.1 per cent) as **general cropping** and 311 (1.3 per cent) as **horticulture**. The **other types** category mainly consists of specialist horse farms, (519 farms in total). Specialist **pigs and poultry** farms together (779) account for 3.2 per cent, while **mixed** farms (574) make up 2.3 per cent of the total.

Farm tenure

Most farms in Northern Ireland include some rented land, 5.9 per cent were entirely rented or leased, 46 per cent had a mixture of owned and rented land and the remaining 48 per cent were entirely owner-occupied (Table 4.9). Much of the rented land is taken under

[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.

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 livestock than would be possible on the owned area. 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 2013, 3,425 farms (14 per cent) had dairy cows, 15,356 (63 per cent) had beef cows and 20,201 (82 per cent) had cattle of some type. The average number of dairy cows per herd, 82, was 1 more than in 2012[2]. It compares with an average herd size for beef breeding herds of approximately 18 cows. Fifty-nine per cent of dairy cows are in herds of 100 or more cows, compared with 7.9 per cent of beef cows.

Some 8,661 farms had breeding sheep, with an average of 106 ewes per flock. There were relatively few large flocks in Northern Ireland with only 19 farms having a flock size of 1,000 ewes or more.

In 2013, pig data was extracted from the Northern Ireland Annual Inventory of Pigs and showed that 418 commercial pig herds were operational in June. Most of the pig herds (329 in 2013) had sows, averaging 129 sows per herd.

Almost 90 per cent of sows were found on farms with 100 or more sows - although these farms make up only 29 per cent of farms with a pig enterprise. Similarly, of total pigs, 28 per cent of the largest units hold over 90 per cent of pigs.

Figures for poultry were taken from the Northern Ireland Bird Register Update in 2013, with only commercial producers considered. Of the 174 business with laying hens four-fifths had flocks over 1,000 birds. Seventeen businesses (10 per cent) farmed over thirty thousand birds with these farms accounting for over 40 per cent of total laying birds. On broiler units, the average flock size is a great deal larger, with over half of farms having thirty thousand birds or more on farm when the register update was conducted in June. Over four-fifths of broilers are found on these farms (Table 4.21).

In 2013, cereals were grown on 2,543 farms, 10 per cent of all farms in Northern Ireland. The average area of a cereal enterprise was 14 hectares (Table 4.24). While almost two-fifths (966) of the farms with cereals had less than 5 hectares, the 140 farms which grew 50 hectares or more accounted for over one third of the total cereal area grown.

Some 566 farms, 2.3 per cent of total farms, grew potatoes in 2013. Of this number, 105 grew 10 hectares or more, with these farms accounting for three quarters of the total area of potatoes grown (Table 4.25).

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[2] Figures for cattle are now derived from the cattle tracing system (APHIS).

Table 4.1 Number and area of farms by area farmed[1], June 2013

Size group (hectares)	By crops and grass area		By total area	
	Farms	Hectares	Farms	Hectares
Nil	492	-	202	-
0.1 - 9.9	4,886	29,022	4,292	25,524
10.0 - 19.9	5,693	82,718	5,293	76,569
20.0 - 29.9	3,951	96,521	3,917	96,125
30.0 - 49.9	4,409	169,828	4,604	178,349
50.0 - 99.9	3,727	254,567	4,314	297,565
100.0 - 199.9	1,162	152,478	1,530	205,053
200.0 +	183	54,421	351	117,766
Total	**24,503**	**839,555**	**24,503**	**997,952**

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 2008 - 2013

	2008	2009	2010	2011	2012	2013
Number of farms	26,952	25,264	24,471	24,436	24,285	24,503
Average area per farm (ha):						
Crops and grass	32.7	33.6	34.1	34.0	34.3	34.3
Total area	39.2	39.9	40.6	40.6	40.8	40.7
Per cent of crops and grass area farmed in units of:						
(hectares)						
0.1 - 9.9	3.8	3.6	3.5	3.5	3.5	3.5
10.0 - 19.9	10.6	10.0	9.6	9.8	9.8	9.9
20.0 - 29.9	11.9	11.6	11.5	11.5	11.5	11.5
30.0 - 49.9	20.7	20.5	20.3	20.3	20.3	20.2
50.0 - 99.9	30.1	30.5	30.3	30.5	30.0	30.3
100.0 +	22.9	23.8	24.9	24.4	24.8	24.6
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 2013

number

Area of crops and grass farmed (hectares)	Business size[1]				
	Very small	Small	Medium	Large	All sizes
Under 10	5,084	164	51	79	5,378
10.0 - 19.9	5,453	161	33	46	5,693
20.0 - 29.9	3,589	269	53	40	3,951
30.0 - 49.9	3,196	922	191	100	4,409
50.0 - 99.9	1,295	1,253	632	547	3,727
100.0 +	102	294	227	722	1,345
Total	**18,719**	**3,063**	**1,187**	**1,534**	**24,503**

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

Table 4.4 Number of farms by business size, June 2008 - 2013

number

Business size[1]	2008	2009	2010	2011	2012	2013
Very small	19,984	19,321	18,617	18,563	18,441	18,719
Small	3,188	3,175	3,085	3,094	3,076	3,063
Medium	1,289	1,302	1,276	1,261	1,210	1,187
Large	1,491	1,466	1,493	1,518	1,558	1,534
Total	**26,146**	**25,264**	**24,471**	**24,436**	**24,285**	**24,503**

1. See Note 1, Table 4.3.

Table 4.5 Number of farms by business size and Less Favoured Area (LFA) category[1], June 2013

number

Business size[2]	Severely Disadvantaged Area (SDA)	Disadvantaged Area (DA)	Total LFA	Non LFA	LFA as % NI
Very small	8,164	5,626	13,790	4,929	74
Small	1,067	921	1,988	1,075	65
Medium	305	346	651	536	55
Large	253	439	692	842	45
Total	**9,789**	**7,332**	**17,121**	**7,382**	**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 2013

number

Business type[1]	Business size[1] Very small	Small	Medium	Large	All sizes
Cereals	235	47	10	8	300
General cropping	390	41	29	48	508
Horticulture	133	54	33	91	311
Pigs	49	34	30	64	177
Poultry	244	204	74	80	602
Dairy	361	808	576	939	2,684
Cattle & sheep (LFA)[2]	12,680	1,185	230	138	14,233
Cattle & sheep (lowland)[2]	3,880	526	127	62	4,595
Mixed	345	96	49	84	574
Others	402	68	29	20	519
All types	**18,719**	**3,063**	**1,187**	**1,534**	**24,503**

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 2008 - 2013

number

Business type[1]	2008	2009	2010	2011	2012	2013
Cereals	338	321	326	310	292	300
General cropping	662	331	342	318	385	508
Horticulture	346	309	314	292	286	311
Pigs	185	197	216	184	176	177
Poultry	551	508	469	613	571	602
Dairy	2,989	2,967	2,781	2,753	2,662	2,684
Cattle & sheep (LFA)[2]	14,992	14,824	14,384	14,259	14,221	14,233
Cattle & sheep (lowland)[2]	4,657	4,630	4,462	4,529	4,565	4,595
Mixed	690	687	652	663	635	574
Others	542	490	525	515	492	519
All types	**25,952**	**25,264**	**24,471**	**24,436**	**24,285**	**24,503**

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 2013

number

Business type[2]	Severely Disadvantaged Area (SDA)	Disadvantaged Area (DA)	Total LFA	Non LFA	LFA as % NI
Cereals	17	33	50	250	17
General cropping	122	127	249	259	49
Horticulture	37	80	117	194	38
Pigs	32	60	92	85	52
Poultry	191	210	401	201	67
Dairy	577	918	1,495	1,189	56
Cattle & sheep	8,640	5,593	14,233	4,595	76
Mixed	67	157	224	350	39
Others	106	154	260	259	50
All types	**9,789**	**7,332**	**17,121**	**7,382**	**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 2013

farms

Owned land as percentage of farmed area	Business size[1]				
	Very small	**Small**	**Medium**	**Large**	**All sizes**
All owner occupied	10,460	854	259	252	11,825
50-<100%	4,537	1,386	552	732	7,207
>0-<50%	2,413	723	353	528	4,017
None owner occupied	1,309	100	23	22	1,454
All farms	**18,719**	**3,063**	**1,187**	**1,534**	**24,503**

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

Table 4.10 Area of land by type of tenure, 2008 - 2013

hectares

	2008	2009	2010	2011	2012	2013
Owner-occupied	694,026	688,016	673,050	675,006	678,167	688,912
Rented	323,356	319,947	320,924	316,435	312,815	309,040
Total	**1,017,381**	**1,007,963**	**993,974**	**991,441**	**990,983**	**997,952**
Percentage of owned land	**68.2**	**68.3**	**67.7**	**68.1**	**68.4**	**69.0**
Common grazing	**36,353**	**36,438**	**36,836**	**36,794**	**36,845**	**35,407**

Table 4.11 Average conacre rents by type of use, 2007 - 2012

£/hectare

Use	2007	2008	2009	2010	2011	2012
Grass	184	193	188	189	195	216
Potatoes	586	686	623	654	703	501
Cereals	190	222	211	240	246	241
Rough grazing	46	41	34	37	41	37
All uses	**162**	**171**	**168**	**172**	**179**	**179**

Source: Farm Business Survey.

Table 4.12 Number of sales and average price of agricultural land by area sold, 2000 - 2005[1,2]

	2000	2001[3]	2002[4]	2003[5]	2004[5]	2005[5]
Number of sales	174	67	55	44	40	63
Area (hectares)	1,614	597	550	520	562	1,095
Value (£ '000)	15,545	5,950	6,851	7,774	9,153	21,722
Average price (£ per ha) by hectare size group						
2 - 9.9	11,749	13,209	14,793	16,376	18,830	27,877
10 - 19.9	7,380	8,665	10,681	12,696	15,082	19,317
20 and over	8,722	6,026	10,449	14,871	12,668	18,149
All sizes (unweighted)	**9,634**	**9,961**	**12,456**	**14,950**	**16,286**	**19,837**

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, 2004 and 2005.

Table 4.13 Distribution of the farm labour force by business size, June 2013

number of persons

Labour item	Business size[1]				
	Very small	Small	Medium	Large	All sizes
Farmers and partners					
Full time	9,192	3,310	1,483	2,250	16,235
Part time	11,607	694	220	277	12,798
Total	**20,799**	**4,004**	**1,703**	**2,527**	**29,033**
Spouses of farmers	**4,200**	**1,026**	**466**	**699**	**6,391**
Other workers					
Full time	951	547	359	1,607	3,464
Part time	2,383	773	327	526	4,009
Casual/seasonal	2,611	845	530	913	4,899
Total other workers	**5,945**	**2,165**	**1,216**	**3,046**	**12,372**
Total agricultural labour force	**30,944**	**7,195**	**3,385**	**6,272**	**47,796**

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 2013

number of persons

Labour item	Severely Disadvantaged Area (SDA)	Disadvantaged Area (DA)	Total LFA	Non LFA	LFA as % NI
Farmers and partners					
Full time	5,996	4,817	10,813	5,422	67
Part time	5,185	3,875	9,060	3,738	71
Total	**11,181**	**8,692**	**19,873**	**9,160**	**68**
Spouses of farmers	**2,351**	**1,868**	**4,219**	**2,172**	**66**
Other workers					
Full time	888	831	1,719	1,745	50
Part time	1,481	1,141	2,622	1,387	65
Casual/seasonal	1,574	1,396	2,970	1,929	61
Total other workers	**3,943**	**3,368**	**7,311**	**5,061**	**59**
Total agricultural labour force	**17,475**	**13,928**	**31,403**	**16,393**	**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 2013

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	15,036	583	*37*	2,738	331	*21*	1,071	202	*13*	1,356	472	*30*	20,201	1,588	*100*
Dairy cows	577	10	*4*	1,052	47	*17*	689	53	*19*	1,107	170	*61*	3,425	279	*100*
Beef cows	11,726	161	*60*	2,118	63	*23*	707	23	*9*	805	23	*8*	15,356	270	*100*
Slaughter cattle >1year	12,551	164	*44*	2,564	85	*23*	1,030	43	*11*	1,331	83	*22*	17,476	376	*100*
Sheep															
Total	6,651	971	*51*	1,403	526	*28*	404	191	*10*	394	215	*11*	8,852	1,904	*100*
Ewes	6,488	472	*51*	1,390	252	*27*	398	92	10	385	105	*11*	8,661	921	*100*
Pigs															
Total	192	15	*3*	77	37	*8*	53	50	*10*	96	379	*79*	418	480	*100*
Sows	137	1	*3*	55	2	*5*	45	4	*9*	92	35	*82*	329	42	*100*
Finishers/ Weaners	136	10	*3*	68	29	*8*	51	37	*11*	92	270	*78*	347	346	*100*
Poultry															
Total	280	3,348	*17*	227	5,233	*27*	96	3,236	*17*	137	7,557	*39*	740	19,374	*100*
Layers	66	218	*9*	58	666	*27*	24	432	*18*	26	1,122	*46*	174	2,438	*100*
Crops															
Oats	159	1	*27*	62	0	*22*	47	0	*19*	65	1	*32*	333	2	*100*
Wheat	198	1	*18*	125	2	*24*	67	1	*10*	204	4	*48*	594	8	*100*
Barley	1,119	8	*32*	481	6	*24*	211	3	*13*	349	8	*31*	2,160	26	*100*
Potatoes	306	1	*12*	121	1	*16*	60	1	*15*	79	2	*56*	566	4	*100*
Crops & grass	18,343	409	*49*	3,005	173	*21*	1,168	89	*11*	1,495	168	*20*	24,011	840	*100*
Rough grazing	4,263	69	*49*	824	35	*25*	273	14	*10*	300	23	*16*	5,660	140	*100*
Total area	18,719	489	*49*	3,063	211	*21*	1,187	104	*10*	1,534	194	*19*	24,503	998	*100*
Labour															
Full-time labour force[2]	9,114	11	*51*	2,835	4	*20*	1,147	2	*9*	1,508	4	*19*	14,604	22	*100*
Output															
Standard Output[3]	18,719	371	*24*	3,063	302	*19*	1,187	222	*14*	1,534	666	*43*	24,503	1,560	*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 2013[1]

	Dairy cows				Beef cows			
	Numbers of		Percentages of		Numbers of		Percentages of	
Number per farm	Farms	Cows	Farms	Cows	Farms	Cows	Farms	Cows
<10	198	1,320	5.8	0.5	6,797	30,755	44.3	11.4
10 - 14	129	1,521	3.8	0.5	2,002	23,332	13.0	8.6
15 - 19	135	2,276	3.9	0.8	1,883	31,781	12.3	11.8
20 - 29	273	6,686	8.0	2.4	2,112	50,403	13.8	18.7
30 - 39	281	9,669	8.2	3.5	1,078	36,533	7.0	13.5
40 - 49	282	12,556	8.2	4.5	560	24,619	3.6	9.1
50 - 59	288	15,687	8.4	5.6	315	16,908	2.1	6.3
60 - 69	244	15,689	7.1	5.6	181	11,593	1.2	4.3
70 - 99	596	49,777	17.4	17.8	279	22,764	1.8	8.4
100 & Over	999	164,300	29.2	58.8	149	21,417	1.0	7.9
Total 2013	**3,425**	**279,481**	**100.0**	**100.0**	**15,356**	**270,105**	**100.0**	**100.0**
Total 2012	***3,520***	***285,369***			***15,665***	***279,195***		
Average 2013		**81.6**				**17.6**		
Average 2012		***81.1***				***17.8***		

1. Cattle figures for 2012 and 2013 were derived from APHIS - the DARD system for recording and tracing cattle movements.

Table 4.17 Distribution of (a) slaughter cattle one year-old and over and (b) total cattle by herd size, June 2013[1]

	Cattle one year old and over, intended for slaughter				Total cattle			
	Numbers of		Percentages of		Numbers of		Percentages of	
Number per farm	Farms	Cattle	Farms	Cattle	Farms	Cattle	Farms	Cattle
1 - 4	5,047	11,321	28.9	3.0	816	2,209	4.0	0.1
5 - 9	3,264	22,087	18.7	5.9	1,414	10,072	7.0	0.6
10 - 19	3,510	49,030	20.1	13.1	2,937	42,232	14.5	2.7
20 - 29	1,832	44,097	10.5	11.7	2,457	59,744	12.2	3.8
30 - 39	1,196	40,694	6.8	10.8	2,033	69,592	10.1	4.4
40 - 49	773	34,142	4.4	9.1	1,457	64,497	7.2	4.1
50 - 69	844	49,095	4.8	13.1	2,212	129,968	10.9	8.2
70 - 99	518	42,084	3.0	11.2	2,143	177,939	10.6	11.2
100 - 199	392	51,277	2.2	13.7	2,867	401,968	14.2	25.3
200 - 299	65	15,548	0.4	4.1	1,035	251,072	5.1	15.8
300 & over	35	16,206	0.2	4.3	830	378,473	4.1	23.8
Total 2013	**17,476**	**375,581**	**100.0**	**100.0**	**20,201**	**1,587,766**	**100.0**	**100.0**
Total 2012	***19,449***	***368,504***			***20,434***	***1,625,446***		
Average 2013		**21.5**				**78.6**		
Average 2012		***18.9***				***79.5***		

1. Cattle figures for 2012 and 2013 were derived from APHIS - the DARD system for recording and tracing cattle movements.

Table 4.18 Distribution of (a) ewes and (b) total sheep by flock size, June 2013

	Ewes				Total sheep			
	Numbers of		Percentages of		Numbers of		Percentages of	
Number per farm	**Farms**	**Ewes**	**Farms**	**Ewes**	**Farms**	**Sheep**	**Farms**	**Sheep**
1 - 24	1,644	22,715	19.0	2.5	841	11,142	9.5	0.6
25 - 49	1,745	62,057	20.1	6.7	1,119	41,232	12.6	2.2
50 - 99	2,252	160,151	26.0	17.4	1,716	124,323	19.4	6.5
100 - 199	1,812	248,861	20.9	27.0	2,093	301,996	23.6	15.9
200 - 299	640	152,077	7.4	16.5	1,174	286,503	13.3	15.1
300 - 399	269	89,804	3.1	9.7	658	225,823	7.4	11.9
400 - 499	127	55,741	1.5	6.0	382	170,883	4.3	9.0
500 - 699	98	56,331	1.1	6.1	419	245,311	4.7	12.9
700 - 999	49	39,434	0.6	4.3	262	214,181	3.0	11.3
1,000 & Over	19	21,527	0.2	2.3	122	146,836	1.4	7.7
Total 2013	**8,661**	**921,416**	**100.0**	**100.0**	**8,852**	**1,903,534**	**100.0**	**100.0**
Total 2012	***8,586***	***937,454***			***8,782***	***1,968,872***		
Average 2013		**106.4**				**215.0**		
Average 2012		***109.2***				***224.2***		

Table 4.19 Distribution of breeding sows by herd size, June 2013[1]

	Sows (including gilts)			
	Numbers of		Percentages of	
Number per farm	**Farms**	**Sows**	**Farms**	**Sows**
1 - 9	134	448	40.7	1.1
10 - 19	20	287	6.1	0.7
20 - 49	34	1,161	10.3	2.7
50 - 99	47	3,528	14.3	8.3
100 - 199	39	5,577	11.9	13.1
200 - 299	21	5,140	6.4	12.1
300 - over	34	26,333	10.3	62.0
Total 2013	**329**	**42,474**	**100.0**	**100.0**
Total 2012	***421***	***38,331***		
Average 2013		**129.1**		
Average 2012		***91.0***		

1. From 2013 onwards, pig figures sourced from the Northern Ireland Annual Inventory of Pigs.

Table 4.20 Distribution of (a) fattening pigs 20kg and over and (b) total pigs by herd size, June 2013

	Fattening pigs 20kg & over				Total pigs			
	Numbers of		Percentages of		Numbers of		Percentages of	
Number per farm	**Farms**	**Pigs**	**Farms**	**Pigs**	**Farms**	**Pigs**	**Farms**	**Pigs**
1 - 9	80	247	23.1	0.1	117	348	28.0	0.1
10 - 19	26	342	7.5	0.1	35	474	8.4	0.1
20 - 49	33	1,040	9.5	0.3	32	1,012	7.7	0.2
50 - 99	24	1,742	6.9	0.5	31	2,258	7.4	0.5
100 - 199	13	1,852	3.7	0.5	20	2,871	4.8	0.6
200 - 399	24	6,465	6.9	1.9	19	5,649	4.5	1.2
400 - 999	54	36,003	15.6	104	46	30,914	11.0	6.4
1,000 - 1,999	49	67.121	14.1	19.4	59	84,433	14.1	17.6
2,000 & over	44	231,620	12.7	66.9	59	352,358	14.1	73.4
Total 2013	**347**	**346,432**	**100.0**	**100.0**	**418**	**480,317**	**100.0**	**100.0**
Total 2012	***n/a***	***n/a***			***547***	***426,924***		
Average 2013		**998.4**				**1149.1**		
Average 2012		***n/a***				***780.5***		

Table 4.21 Distribution of (a) laying hens and (b) broilers by flock size, June 2013[1]

Number per farm	Laying Hens: Numbers of Farms	Laying Hens: Numbers of Hens ('000)	Laying Hens: Percentages of Farms	Laying Hens: Percentages of Hens	Broilers: Numbers of Farms	Broilers: Numbers of Broilers ('000)	Broilers: Percentages of Farms	Broilers: Percentages of Broilers
1 - 999	31	4	17.8	0.2	8	1	2.5	0.0
1,000 - 4,999	12	33	6.9	1.4	3	9	0.9	0.1
5,000 - 9,999	50	351	28.7	14.4	13	105	4.1	0.8
10,000 - 19,999	48	683	27.6	28.0	78	1,288	24.7	9.6
20,000 - 29,999	16	382	9.2	15.7	49	1,210	15.5	9.0
30,000 - 49,999	11	409	6.3	16.8	86	3,266	27.2	24.3
50,000 & over	6	576	3.4	23.6	79	7,534	25.0	56.2
Total 2013	**174**	**2,438**	**100.0**	**100.0**	**316**	**13,412**	**100.0**	**100.0**
Total 2012	***173***	***2,557***			***315***	***13,459***		
Average 2013		**14,014**				**42,443**		
Average 2012		***14,779***				***42,728***		

1. Figures for poultry numbers are taken from the Northern Ireland Bird Register Update.

Table 4.22 Distribution of total poultry by flock size, June 2013[1]

Number per farm	Total poultry: Numbers of Farms	Total poultry: Numbers of Birds ('000)	Total poultry: Percentages of Farms	Total poultry: Percentages of Birds
1 - 999	59	16	8.0	0.1
1,000 - 4,999	60	165	8.1	0.9
5,000 - 9,999	117	819	15.8	4.2
10,000 - 19,999	208	3,143	28.1	16.2
20,000 - 29,999	90	2,179	12.2	11.2
30,000 - 49,999	115	4,299	15.5	22.2
50,000 & over	91	8,753	12.3	45.2
Total 2013	**740**	**19,374**	**100.0**	**100.0**
Total 2012	***724***	***19,188***		
Average 2013		**26,181**		
Average 2012		***26,503***		

1. Figures for poultry numbers are taken from the Northern Ireland Bird Register Update.

Table 4.23 Distribution of (a) barley and (b) wheat by area of crop, June 2013

	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	33	22	1.5	0.1	7	5	1.2	0.1
1 - 4.9	846	2,429	39.2	9.4	192	594	32.3	7.5
5 - 9.9	524	3,742	24.3	14.5	157	1,110	26.4	13.9
10 - 19.9	424	5,744	19.6	22.3	122	1,640	20.5	20.6
20 - 29.9	153	3,624	7.1	14.1	54	1,284	9.1	16.1
30 - 39.9	67	2,289	3.1	8.9	24	806	4.0	10.1
40 - 49.9	37	1,610	1.7	6.3	16	688	2.7	8.6
50 & over	76	6,298	3.5	24.5	22	1,840	3.7	23.1
Total 2013	**2,160**	**25,757**	**100.0**	**100.0**	**594**	**7,968**	**100.0**	**100.0**
Total 2012	***2,271***	***25,533***			***693***	***9,395***		
Average 2013		**11.9**				**13.4**		
Average 2012		***11.2***				***13.6***		

Table 4.24 Distribution of total cereals by area of crop, June 2013

	Total cereals			
Area per farm (ha)	Number of Farms	Area of Cereals (ha)	Percentages of Farms	Percentages of Cereals
under 1	42	27	1.7	0.1
1 - 4.9	924	2,647	36.3	7.4
5 - 9.9	622	4,444	24.5	12.4
10 - 19.9	499	6,900	19.6	19.2
20 - 29.9	176	4,120	6.9	11.5
30 - 39.9	88	2,981	3.5	8.3
40 - 49.9	52	2,271	2.0	6.3
50 & over	140	12,541	5.5	34.9
Total 2013	**2,543**	**35,931**	**100.0**	**100.0**
Total 2012	***2,684***	***37,066***		
Average 2013		**14.1**		
Average 2012		***13.8***		

Table 4.25 Distribution of potatoes by area of crop, June 2013

	Potatoes			
Area per farm (ha)	Number of Farms	Area of Potatoes (ha)	Percentages of Farms	Percentages of Potatoes
under 1	168	76	29.7	1.7
1 - 4.9	225	535	39.8	12.4
5 - 9.9	68	470	12.0	10.9
10 - 19.9	49	677	8.7	15.7
20 - 29.9	25	600	4.4	13.9
30 - 39.9	11	369	1.9	8.5
40 - 49.9	3	131	0.5	3.0
50 & over	17	1,468	3.0	33.9
Total 2013	**566**	**4,325**	**100.0**	**100.0**
Total 2012	***576***	***4,150***		
Average 2013		**7.6**		
Average 2012		***7.2***		

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 2012/13’.

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, are based. The income measures derived from the two sources are not therefore directly comparable. It should be noted that the latest year for which FBS results are available is 2012/13. However, provisional income estimates are also presented below for the 2013/14 year.

Income measures

Farm Business Income (FBI) was introduced in January 2008 as new headline measure of farm income in the UK following consultation in 2006-07. It is closely aligned to the main EU measure of farm incomes ‘Family Farm Income’ and therefore allows easier comparison between Northern Ireland and other Member States. FBI is the return to all unpaid labour (farmer, spouses and others with an entrepreneurial interest in the farm business) and to their capital invested in the farm business which includes land and buildings.

Net Farm Income (NFI) was the previous headline measure of farm income. NFI represents the return to the farmer and spouse for their manual and managerial labour and tenant-type capital invested in the farm business. In order for NFI to represent the return to farmer and spouse alone, a notional deduction is made for any unpaid labour that is provided in addition to that of the farmer or spouse. Also, to confine NFI to tenant type activities and assets of the business an imputed rent is firstly deducted for owner occupied land and buildings and for landlord type improvements made by the tenant. Secondly, no account is taken of interest paid on any farming loans, overdrafts or mortgages or any interest earned on financial assets.

FBI differs from NFI in that it represents the return to all unpaid labour, not just the farmer and spouse and it treats the tenure of farms as it is: tenants as tenants, owner occupiers as owner occupiers and those with both types of tenure as mixed.

Cash Income (CI), measures the difference between total farm receipts and total farm cash costs. This measure excludes notional items such as depreciation charges and livestock/crop valuation changes. It also takes no account of net expenditure on capital investment. CI provides a better indication than NFI and FBI of the short term income position. Trends in Cash Income since 2008/2009 are presented in Table 5.1.

Income changes 2012/13

Cash Income, Farm Business Income and Net Farm Income by type of farm for the years ending mid-February 2011/12 and 2012/13 are presented in Tables 5.3 to 5.5. These income figures are for a sample of 281 farm businesses which were in the FBS in both account years and are at least 0.5 Standard Labour Requirements in size. This sample of farms is representative of 98 per cent of the farms of this size in Northern Ireland. The only significant types of farm business excluded from the FBS are horticulture and poultry.

At the individual farm type level the results show that both Farm Business Income and Net Farm Income increased between 2011/12 and 2012/13 on Cereals and General Cropping farms, whereas, they both decreased between 2011/12 and 2012/13 on Dairy, Pig, Cattle & Sheep (LFA), Cattle & Sheep (Lowland), and Mixed farms. In terms of Cash Income, the results show an increase between 2011/12 and 2012/13 for General Cropping and Mixed farms, whereas, a decrease is shown for Cereals, Dairy, Pig, Cattle & Sheep (LFA), and Cattle & Sheep (Lowland) farms.

Measured across all farm types, average Farm Business Income decreased from £31,992 in 2011/12 to £19,336 in 2012/13, a decrease of £12,656 per farm. Also measured across all farm types, average Net Farm Income decreased from £25,354 in 2011/12 to £12,888 in 2012/13 (a decrease of £12,466 per farm) and average Cash Income decreased from £45,325 in 2011/12 to £36,485 in 2012/13 (a decrease of £8,840 per farm).

Provisional estimates of incomes for 2013/14

Provisional estimates of incomes for full time farm businesses for the year ending mid February 2014 show average Farm Business Income measured across all farm types increasing from £19,336 in 2012/13 to £30,976 in 2013/14 i.e. an increase of £11,640 or 60 per cent per farm.

At the individual farm type level, the results show that Farm Business Income is expected to increase between 2012/13 and 2013/14 on Dairy, Cattle and Sheep (LFA), Cattle and Sheep (Lowland), Pigs and Mixed farms. For these farms, the increase in incomes results from higher product prices in the 2013/14 accounting year. The results also show that Cereal and General Cropping farms are expected to show a fall in Farm Business Income for 2013/14 when compared with the previous year. The downturn in incomes for these farms is mainly the result of lower grain and potato prices in the 2013/14 accounting year.

Average Cash Income measured across all farm types is estimated to increase from £36,485 in 2012/13 to £48,567 in 2013/14, which is an increase of £12,082 per farm. Whereas, average Net Farm Income measured across all farm types is estimated to be £24,851 in 2013/14 which is a £11,963 increase on the previous year.

The provisional income estimates described above were prepared in mid-January 2014 and relate to an account year ending in mid February 2014. 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 2013/14, 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, 2008/2009 to 2013/14[1]

Indices: 2005/06 - 2007/08 = 100

Business type	08/09	09/10	10/11	11/12	12/13	13/14 (provisional)
Cereals	110	90	163	120	172	154
General cropping	197	. . .	. . .	128	130	63
Pigs	78	163	190	138	123	160
Dairy	104	72	134	139	93	152
Cattle and sheep (LFA)	120	127	111	123	98	110
Cattle and sheep (lowland)	96	117	83	125	102	119
Mixed	203	196	213	248	224	231
All types	112	99	119	129	96	126

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), farm business income (FBI) and by farm type, 2012/13

per cent

	Dairy			Cattle and sheep (LFA)			All types		
Income (£'s)	**CI**	**NFI**	**FBI**	**CI**	**NFI**	**FBI**	**CI**	**NFI**	**FBI**
Less than 0	5	19	16	5	40	27	6	34	23
1 - 4,999	2	10	4	13	13	10	8	11	8
5,000 - 9,999	1	6	9	8	15	13	6	12	12
10,000 - 14,999	5	11	10	18	10	11	12	9	9
15,000 - 19,999	3	6	8	9	6	12	8	6	11
20,000 - 29,999	15	15	18	12	10	17	13	11	16
30,000 - 49,999	28	14	14	24	3	4	25	8	9
> 50,000	41	19	21	11	3	6	22	9	12
Total	**..**	**100**	**..**	**..**	**100**	**..**	**..**	**100**	**..**
Number of farms in sample		107			102			281	

Table 5.3 Cash income by business size and farm type, 2011/12 and 2012/13

£'000 per farm[1]

Business type	0.5 < 1 SLR		1 < 2 SLR		2 < 3 SLR		> 3 SLR		+ 0.5 SLR	
	2011/12	2012/13	2011/12	2012/13	2011/12	2012/13	2011/12	2012/13	2011/12	2012/13
Cereals	. . .	. . .	. . .	. . .	. . .	. . .	. . .	. . .	70.7	70.0
General cropping	. . .	. . .	. . .	. . .	. . .	. . .	. . .	. . .	41.1	81.4
Pigs	48.7	40.5	35.9	29.6	. . .	. . .	. . .	. . .	66.0	48.0
Dairy	26.1	19.1	39.7	27.5	75.0	56.1	133.4	89.9	81.3	56.4
Cattle and sheep (LFA)	18.7	16.0	40.2	33.5	56.5	61.7	95.0	111.5	28.0	24.9
Cattle and sheep (lowland)	19.5	15.6	29.6	23.4	. . .	. . .	. . .	. . .	28.4	22.5
Mixed	22.1	34.1	45.1	43.6	75.4	109.2	132.6	118.7	61.0	66.9
All types	19.9	17.3	39.4	31.8	71.4	64.9	123.9	89.5	45.3	36.5

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 Farm business income by business size and farm type, 2011/12 and 2012/13

£'000 per farm[1]

Business type	0.5 < 1 SLR		1 < 2 SLR		2 < 3 SLR		> 3 SLR		+ 0.5 SLR	
	2011/12	2012/13	2011/12	2012/13	2011/12	2012/13	2011/12	2012/13	2011/12	2012/13
Cereals	. . .	. . .	. . .	. . .	. . .	. . .	. . .	. . .	34.6	38.2
General cropping	. . .	. . .	. . .	. . .	. . .	. . .	. . .	. . .	24.3	66.4
Pigs	27.3	26.9	24.6	17.1	. . .	. . .	. . .	. . .	48.4	31.5
Dairy	19.4	14.0	28.7	14.6	53.7	25.0	90.1	44.2	56.3	27.9
Cattle and sheep (LFA)	13.9	8.0	29.1	14.3	43.3	43.3	74.0	84.0	20.7	12.9
Cattle and sheep (lowland)	15.0	8.2	20.1	12.1	. . .	. . .	. . .	. . .	19.4	11.5
Mixed	20.0	20.3	21.9	18.0	59.4	89.9	111.0	82.4	46.6	44.0
All types	15.0	9.2	27.3	15.4	49.6	37.8	86.1	47.9	32.0	19.3

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 Net farm income by business size and farm type, 2011/12 and 2012/13

£'000 per farm[1]

Business type	0.5 < 1 SLR		1 < 2 SLR		2 < 3 SLR		> 3 SLR		+ 0.5 SLR	
	2011/12	2012/13	2011/12	2012/13	2011/12	2012/13	2011/12	2012/13	2011/12	2012/13
Cereals	. . .	. . .	. . .	. . .	. . .	. . .	. . .	. . .	26.9	31.1
General cropping	. . .	. . .	. . .	. . .	. . .	. . .	. . .	. . .	17.2	58.5
Pigs	27.4	27.1	28.8	21.4	. . .	. . .	. . .	. . .	54.9	38.5
Dairy	15.5	9.8	26.4	12.6	47.2	20.1	86.5	40.5	52.4	24.5
Cattle and sheep (LFA)	8.1	2.0	22.2	9.0	16.5	16.7	41.1	49.3	13.1	5.6
Cattle and sheep (lowland)	9.2	2.2	9.5	1.5	. . .	. . .	. . .	. . .	13.0	4.6
Mixed	8.2	8.4	6.8	3.3	16.0	47.2	95.7	67.8	28.2	26.0
All types	9.0	3.1	20.9	9.8	37.5	26.0	80.8	42.6	25.4	12.9

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 5.6 Average tenant's capital by farm type, 2012/13

£'000 per farm[1]

	Cereals	General cropping	Dairy	Cattle and sheep (LFA)	Cattle and sheep (lowland)	Mixed	All Types
Farm size (ESUs)	50.0	55.3	100.7	24.1	26.6	56.9	48.0
Total farm area (ha)	90.9	67.8	83.2	96.4	64.4	83.2	85.1
Farm Business income	38.2	66.4	27.9	12.9	11.5	44.0	19.3
Total tenant's capital	**132.4**	**111.9**	**186.7**	**88.4**	**117.7**	**196.6**	**126.8**
of which:							
Short term (working) capital							
trading livestock	3.7	10.3	35.2	32.4	50.6	64.5	37.9
crops	10.8	20.3	12.4	5.4	6.7	18.0	8.3
other	2.1	3.9	1.5	0.7	1.0	3.2	1.1
Medium term capital							
breeding livestock	3.3	. . .	81.1	21.2	25.7	33.8	38.5
machinery	112.5	77.5	56.7	28.6	33.6	77.1	41.0

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 5.7 Average closing valuations by farm type, 2011/12 and 2012/13

£'000 per farm[1]

	Dairy		Cattle and sheep (LFA)		All types	
	2011/12	2012/13	2011/12	2012/13	2011/12	2012/13
ASSETS						
Total fixed assets	1,299.8	1,318.0	1,112.7	1,090.3	1,208.3	1,210.4
of which:						
land and buildings	1,163.3	1,180.6	1,054.7	1,032.1	1,125.7	1,126.5
other fixed assets	136.6	137.5	58.0	58.1	82.5	83.9
Total current assets	64.6	66.6	38.4	38.7	51.4	52.5
of which:						
trading livestock, crops and stores	48.5	49.4	38.3	38.7	46.9	47.7
debtors/other short term lending	16.1	17.2	-	-	4.5	4.8
cash in hand and at bank	-	-	-	-	-	-
A Total assets	**1,364.4**	**1,384.6**	**1,151.0**	**1,129.0**	**1,259.7**	**1,262.9**
LIABILITIES						
Total long/medium term loans	75.0	73.4	3.7	4.9	23.9	24.4
of which:						
bank/other institutional	72.8	71.4	3.7	4.9	23.3	23.9
Total short term loans	28.9	32.9	5.7	5.4	14.7	15.3
of which:						
bank overdraft	0.0	23.3	4.9	4.7	10.2	11.1
B Total external liabilities	**103.9**	**106.3**	**9.4**	**10.2**	**38.6**	**39.6**
NET WORTH (A-B)	**1,260.6**	**1,278.3**	**1,141.6**	**1,118.7**	**1,221.1**	**1,223.3**

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. **Single Factorial Terms of Trade (SFTT)** is a useful measure of changes in farmers' economic welfare. It provides additional information on the state of the agri-food industry in Northern Ireland by adding perspective to TFP. Changes in this index over time provide an indication of whether or not the traditional decline in farm gate prices relative to farm input prices is offset by improvements in productivity. Consequently, it is a measure of return to factors engaged in agricultural production and, in effect, a measure of how farmers' economic welfare changes over any given period. An increase implies an improvement in farmers' welfare (in other words, although farm-gate prices may have fallen relative to input costs, this has been more than offset by improved productivity). On the other hand, a decrease means that improved productivity has not kept pace with adverse output/input price movements and, hence, the benefits of any productivity improvement are being captured by economic agents in the rest of the domestic economy and/or foreign economies. Alternatively, if productivity has deteriorated then a decrease/increase in SFTT suggests that the affect of this on farmers' welfare has not been reversed by improved/adverse changes in the relationship between output and input prices. In 2013, single factorial terms of trade increased by 11 per cent. Although productivity fell in 2013, there was a favourable output/input price movement. **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 declined by 3.1 per cent decrease between 2012 and 2013.

Food Sector Performance

The performance indicators show that sales and value added per employee in the food and drinks processing sector have grown in each year since 2006. Return on capital employed (ROCE) has been rising since 2006 apart from 2011 when there was a fall.

Table 6.1 Agricultural productivity indices

Indices: 2005 = 100

	2008	2009	2010	2011	2012	2013 (provisional)
Total factor productivity in NI[1]	103.8	99.8	100.3	102.5	100.5	99.9
Total factor productivity in UK[2]	101.0	98.5	98.6	100.3	97.3	. . .
Single Factorial Terms of Trade[3]	97.4	99.2	105.6	103.1	96.8	107.5
Labour productivity in NI[4]	108.0	92.1	96.5	110.7	105.3	102.0

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. Single factorial terms of trade measures changes in farmers' economic welfare. See section A in Chapter Six for a full explanation of this concept. For further details on calculation of this index consult, Fleming, E. 2007 'Use of the single factorial terms of trade to analyse agricultural production', *The Australian Journal of Agricultural and Resource Economics,* 51, p. 113-119.
4. Calculated as the ratio of net value added at constant prices to total labour input (in Annual Work Units).

Table 6.2 Performance indicators for the food and drinks processing sector in Northern Ireland[1,2]

	2006	2007	2008	2009	2010	2011
Sales per employee (£)	140,907	153,002	166,592	174,865	187,544	203,039
Value added per employee (£)	26,200	28,483	29,263	31,394	31,869	32,428
Rate of return on capital employed (%)	6.7	7.6	7.6	9.9	10.5	9.7

1. 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, subsector statistics'*, DARD.
2. These figures do not include an estimate for Food and Drinks processing businesses with turnovers of less than £250,000.

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 in this case 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. Therefore, rural areas are split into more accessible and less accessible areas, defined as follows (based on LGDs). 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 2013, using the LGD based definition of the rural population, 33 per cent of the total population are less accessible rural, 31 per cent are accessible rural and overall 64 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 and less accessible rural populations are expected to increase.

Earnings

Average gross weekly earnings increased in 2013 in urban and less accessible rural areas. Average gross weekly earnings of people in rural areas are consistently below those of people living in urban areas over the years from 2008 to 2013. Between 2012 and 2013 the gap increased between those living in urban and less accessible rural areas. The gap also increased between those living in urban and accessible rural areas. The gap in earning decreased between those living in accessible rural areas and those living in less accessible rural areas.

Rural Businesses

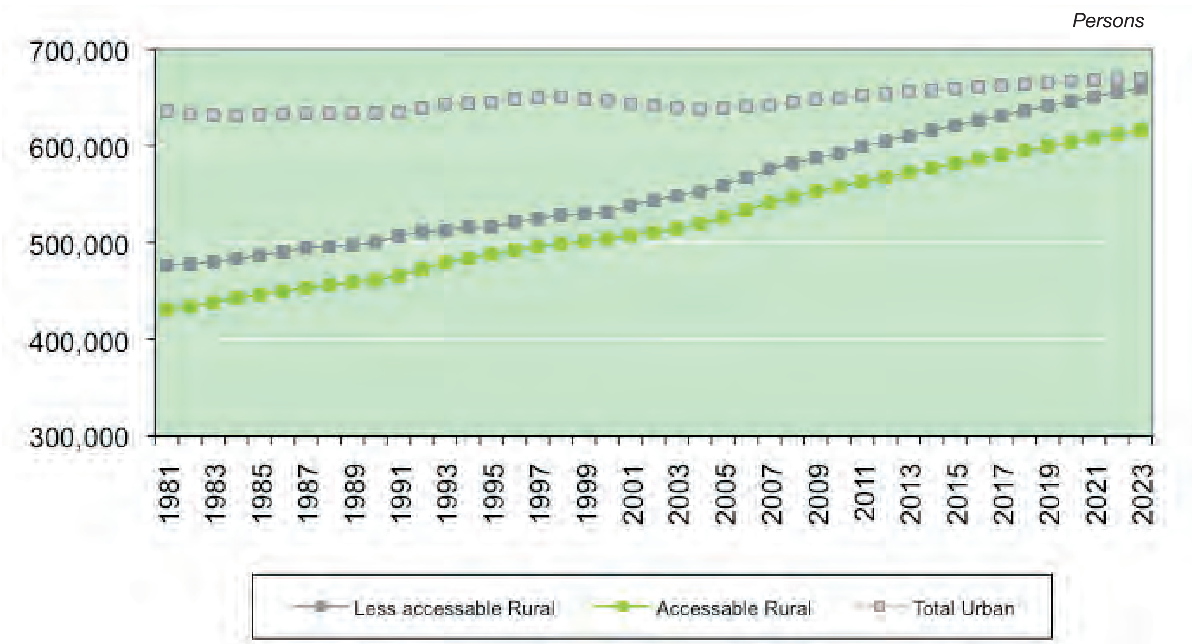
In 2013 there were 66,685 businesses in Northern Ireland that were registered for VAT and /or PAYE schemes. Businesses are legally obliged to register for VAT once their turnover exceeds £79,000. Approximately 25 per cent of businesses are located, or have their head offices, in urban areas. The tendency for head offices to be located in Belfast may skew the figures a little. Agriculture is the dominant industry group in the Accessible Rural and Less Accessible Rural areas, accounting for 24 and 37 per cent, respectively, of total VAT registered businesses in these zones. Businesses involved in construction were second most prevalent in these rural areas, while those involved in retail were the third most prevalent.

The number of net VAT registrations disaggregated by area over the period from 2004-2013 indicates that less accessible rural areas have demonstrated the strongest growth in net registrations. Accessible and less accessible rural areas accounted for 69 per cent of total net registrations over this period.

Rural Employment

Northern Ireland is a small business economy, with micro businesses (those with less than 10 employees) accounting for 89 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 91 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 83 per cent.

Figure 6.1 Population Trends and Projections in NI[1]



1. The changes in the rural and urban populations from 1981 to 2012 are actual while those for 2013 to 2023 are estimates. Source: NISRA (NISRA website: http://www.nisra.gov.uk/)

Table 6.3 Average Gross Weekly Earnings per Person[1]

£ per week

	2008	2009	2010	2011	2012	2013
Urban	486.77	499.55	520.68	532.97	521.05	542.13
Accessible Rural	454.80	480.26	472.43	490.21	505.44	502.99
Less Accessible Rural	432.18	439.53	451.97	428.78	452.08	472.41

1. LGD based definition of Rural Areas is used. Source: NISRA (NINIS website: http://www.ninis.nisra.gov.uk/)
2. Survey methodology changed in 2004 and again in 2006 therefore creating discontinuity in the time series, data for previous years therefore are not directly comparable. Source: DETI, Annual Survey of Hours and Earnings.

Table 6.4 VAT and/or PAYE based enterprises in Northern Ireland by industrial group, Urban - Rural classification, 2013[1,2,3]

	Urban	Accessible Rural	Less Accessible Rural	Total
	%	%	%	Number
Agriculture (incl. Fishing)	4	28	68	16,820
Production	23	31	47	4,225
Construction	20	31	49	9,605
Motor Trades	22	33	45	2,355
Wholesale	28	33	39	3,210
Retail	31	29	40	6,125
Transport & Storage (inc. postal)	22	30	48	2,135
Accommodation & Food Services	35	29	36	3,515
Information & Communication	54	27	20	1,375
Finance & Insurance	49	24	27	995
Property	42	27	31	1,885
Professional, Scientific and Technical	50	26	25	4,870
Business Admin & Support Services	29	30	40	2,273
Public Admin & Defence	86	14	0	35
Education	41	28	31	560
Health	43	26	31	2,680
Arts, Entertainment, Recreation & Other Services	39	30	32	4,040
All Categories	**25**	**29**	**46**	**66,685**

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, 2013 (National Statistics website: http://www.ons.gov.uk)

Table 6.5 Northern Ireland Net VAT Registrations[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
2004	4,245	25	2,470	13	2,430	8.9	9,145	15
2005	-3,990	-31	-2,100	-13	-1,565	-6.1	-7,655	-14
2006	175	1.3	385	2.3	845	3.2	1,405	2.5
2007	4,900	27	3,105	16	3,660	12	11,665	17
2008	300	1.6	870	4.2	2,055	6.4	3,225	4.5
2009	-345	-1.9	-230	-1.1	-360	-1.1	-935	-1.3
2010	-640	-3.7	-615	-3.1	-840	-2.7	-2,095	-3.1
2011	-275	-1.6	-175	-0.9	-130	-0.4	-580	-0.9
2012	-175	-1.0	-215	-1.1	-65	-0.2	-455	-0.7
2013	-180	-1.1	-335	-1.7	-280	-0.9	-795	-1.2

1. Source: Derived from UK Business: Activity, Size and Location (various years) (National Statistics website: http://www.ons.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 6.6 VAT registered enterprises by employee size-band, Urban - Rural Classification, 2013[1]

Employee Size Band	Urban Number	Urban %	Accessible Rural Number	Accessible Rural %	Less Accessible Rural Number	Less Accessible Rural %	Total Number	Total %
0-4	11,125	22	14,755	29	25,045	49	50,925	100
5-9	2,770	33	2,505	30	3,180	38	8,455	100
10-49	2,305	38	1,755	29	2,075	34	6,135	100
50-99	270	43	145	24	210	34	625	100
100-249	165	46	80	21	115	32	360	100
250+	105	54	55	27	35	18	195	100
Total	**16,740**	**25**	**19,292**	**29**	**30,660**	**46**	**66,695**	**100**

1. Source: Derived from UK Business: Activity, Size and Location, 2013 (National Statistics website: http://www.ons.gov.uk/)

C. ANIMAL HEALTH AND WELFARE

Rural Population

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, bovine brucellosis and Bovine Spongiform Encephalopathy (BSE). Since BSE was first reported in Northern Ireland during 1988, there have been a total of 2,189 cases. The number of BSE cases in Northern Ireland has declined significantly since the peak in 1993. There was no cases of BSE in 2013.

During 2013, an additional 1,479 herds in Northern Ireland were affected by bovine tuberculosis, while 26 were new brucellosis serological reactor breakdowns. The last confirmed brucellosis breakdown occurred in February 2012. Bovine tuberculosis and brucellosis were at peak levels in 2002 and since that time the herd incidence for both diseases has reduced significantly.

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 houses 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 Veterinary Service carried out 722 on-farm welfare inspections in 2013. Inspections take place as a result of complaints from members of the public; or are targeted as a result of information produced by vets working in meat plants; or are programmed as part of the statutory cross compliance surveillance system to assess whether on-farm welfare meets the standards laid down in legislation. Since 2007 many of the inspections are carried out as part of the Cross-Compliance inspection programme associated with the Single Farm Payment scheme. Some inspections, particularly in the complaint category, will represent repeated visits to the same farm where an on-farm welfare problem has been identified. Most inspections will involve more than one category of stock inspection.

Of the 722 welfare inspections carried out on farms by the VS in Northern Ireland during 2013, 88 per cent were complaint, targeted, or cross compliance inspections (where herds are identified as being “at risk”) with the remaining 12 per cent random cross compliance checks.

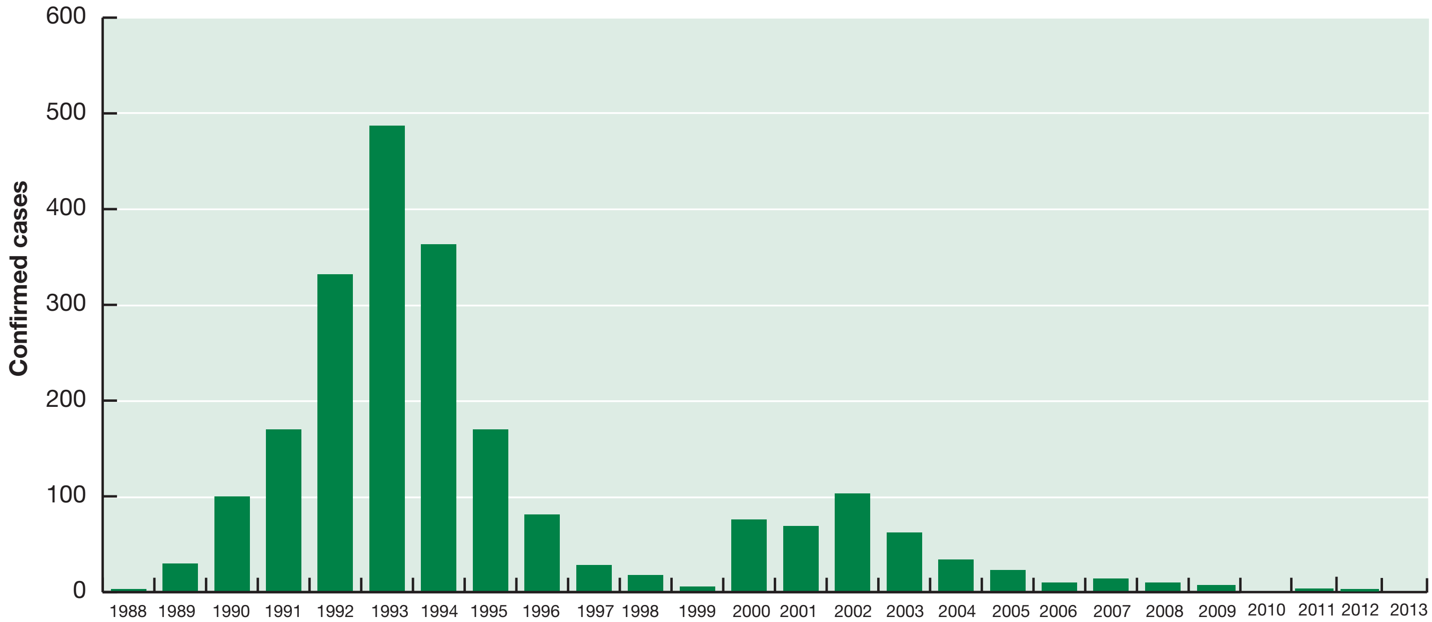
Of the 84 random cross compliance inspections in 2013, 99 per cent achieved an overall assessment of compliance with legislation (compared with 97 per cent in 2008 and 2009, 99 per cent in 2010 and 100 per cent in 2011 and 2012).

Of the compliant and targeted visits and risk-assessment cross compliance based visits in total, 76 per cent achieved compliance with legislation (compared with, 84 per cent in 2008, 77 per cent in 2009, 81 per cent in 2010, 83 per cent 2011 and 78 per cent in 2012). While, 24 per cent of these 638 visits indicated levels of non-compliance needing corrective action.

Taking all welfare inspections into account there were 6 per cent assessed as showing a serious welfare problem requiring immediate action with respect to application of administrative or criminal penalties.

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 PSNI and the USPCA.

Figure 6.2 Bovine Spongiform Encephalopathy (BSE): Confirmed cases in N.I including clinical and active surveillance cases[1]



1. Source: TSE Branch DARD, contact James Moody 028 9052 4642.

Table 6.7 Confirmed cases of BSE[1]

cases

Type	Category	2008	2009	2010	2011	2012	2013
Passive Surveillance	On farm suspects	0	0	0	0	0	0
	Abattoir suspects	0	0	0	0	0	0
Active Surveillance	Fallen animals	4	2	0	2	1	0
	OTM Casualty animals	0	0	0	0	0	0
	OTM Random animals	0	0	0	0	0	0
	OTM Ante-Mortem Failure animals	0	0	0	0	0	0
	Over 42 months survey (including 1996/97 cohort)	0	0	0	0	0	0
	Over 48 month Human Consumption animals	0	1	0	0	0	0
	OTM Human Consumption animals	0	0	0	0	0	0
	Cohorts of BSE Cases	0	0	0	0	0	0
	Total	**4**	**3**	**0**	**2**	**1**	**0**

1. Source: TSE Branch DARD, contact James Moody 028 9052 4642.

Table 6.8 Bovine Tuberculosis (TB) Statistics

	2008	2009	2010	2011	2012	2013
No. cattle herds eligible for TB testing[1]	26,780	26,287	25,933	25,677	25,776	25,671
Total Number of Unrestricted Herd Tests	26,881	27,519	26,527	27,247	26,992	26,707
Total number of animals TB tested	1,591,976	1,601,287	1,583,268	1,607,171	1,643,626	1,620,056
Total new herd TB incidents[2]	1,274	1,293	1,160	1,386	1,695	1,479
TB reactors slaughtered	8,391	8,198	6,404	8,136	10,897	8,271

1. Based on the number of cattle herds presenting cattle for a TB herd test during the previous four years.
2. Herds with at least one TB skin reactor animal but no TB skin reactor animals during the previous 12 months.

Table 6.9 Bovine Brucellosis (BR) Statistics

	2008	2009	2010	2011	2012	2013
No. cattle herds eligible for BR testing[1]	24,366	23,996	23,553	23,302	23,189	23,121
Total number of unrestricted Herd Tests	25,017	23,805	23,219	23,297	21,622	20,808
Total number of animals BR tested	961,894	936,672	925,361	945,609	938,693	926,166
Total new herd BR incidents[2]	177	71	74	21	23	26
BR reactors slaughtered	384	116	184	247	64	32

1. Based on the number of cattle herds presenting cattle for a brucellosis herd test during the previous four years.
2. Herds with at least one brucellosis serological reactor animal but no reactor animals during the previous 12 months.

Table 6.10 Outcomes (provisional) of on-farm animal welfare inspections completed on NI farms in 2013

Type of inspections	Compliance with animal welfare legislation	Number of Inspections	Category[1] of Non-compliance	Number per category	Percentage of total %
Cross-compliance programme of random inspections	No	1	A	1	1.2
			B	0	0.0
			C	0	0.0
	Yes	83		83	98.8
	Total	**84**		**84**	**100.0**
Cross-compliance Risk Assessment based, other Targeted and Complaint related inspections	No	152	A	78	12.2
			B	31	4.9
			C	43	6.7
	Yes	468		486	76.2
	Total	**638**		**638**	**100.0**
All inspections	No	153	A	79	10.9
			B	31	4.3
			C	43	6.0
	Yes	569		569	78.8
	Total	**722**		**722**	**100.0**

Note 1. Reference EC decision 2006/778. Categories of non-compliance are defined as follows:

- Category A e.g.: non-compliance related to housing or animal treatment with no immediate action for administrative or criminal penalties, though corrective action is required within 3 months.
- Category B e.g.: non-compliance associated with staff training, record keeping or frequency of inspection of animals with no immediate action for administrative or criminal penalties, though notice should give an appropriate amount of time to make the necessary improvements i.e. more than 3 months.
- Category C e.g.: a serious welfare problem requiring immediate action with respect to application of administrative or criminal penalties.

D. AGRI-ENVIRONMENT

Greenhouse Gas Emissions

Greenhouse gases include carbon dioxide, methane and nitrous oxide. The presence of these gases in the atmosphere affects the temperature of the earth. There are concerns that increasing concentrations of greenhouse gases in the atmosphere are contributing to climate changes with potentially harmful consequences for the environment and human health. Agriculture is a major contributor to emissions of methane and nitrous oxide. In 2010, agriculture was estimated to contribute 26 per cent of all greenhouse gas emissions in Northern Ireland (compared to 24 per cent in 1990). Total emissions from agriculture fell by 10 per cent between 1990 and 2010. Total GHG emission rose in Northern Ireland in 2010 compared to 2009 by 3.6 per cent, while over the same period agricultural emissions decreased marginally.

Agri-environmental schemes

Agri-environmental schemes are managed in Northern Ireland under the Rural Development Programme (RDP). In 2013, some 388,000 hectares or 37 per cent of farmland was registered in an agri-environmental scheme in Northern Ireland compared to 44 per cent in 2012. The percentage area of farmland under agreement decreased in 2013 because of the numbers of agreements reaching the contract end point.

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. Northern Ireland has one of the lowest proportions of farmland under organic management amongst the EU-15. The organic farming data is provided by Defra and there has been some adjustment to the way in which yearly data is labelled. The previous method for labelling the yearly data meant that data collected throughout 2008 would be labelled January 2009. It was thought that this method was slightly mis-leading as this could imply that the data provided represents the state of organic production at that given point in time. The revised method means that data collected during 2008 and supplied at the end of January 2009 will now be labelled 2008. All yearly data has been re-labelled accordingly. The area of land farmed organically in Northern Ireland fell from 12,000 hectares in 2011 to 10,000 hectares in 2012. There was a fall in the UK overall also.

Water quality

Farming continues to be a source of water pollution, both diffuse, such as from fertiliser and pesticides spread on the land, and point sources such as runoff from livestock buildings. The main areas of concern are nitrate pollution in surface and groundwater, phosphorus levels in surface water and contamination by pesticides.

There are a number of ways to assess water quality. An overall classification which uses a combination of biological, chemical and hydromorphological quality elements (including macroinvertebrates, pH and ammonia) can be derived from the specification of quality elements in the Water Framework Directive. This classification permits the quality status of river water-bodies to be assigned as one of five classes from 'high through to 'bad'. In 2012, 22 per cent of river water-bodies were classified as 'high' or 'good'. This is a decrease of 1.1 per cent point compared with 2011. The percentage of rivers categorised as poor or bad declined slightly over the same period.

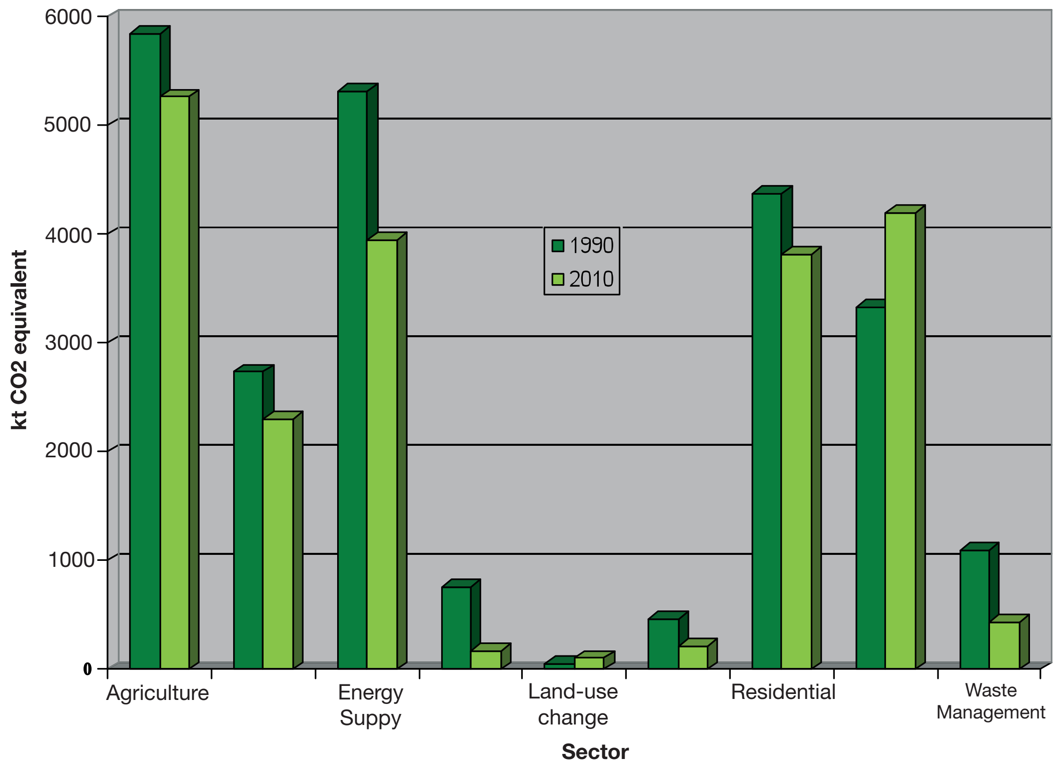
The Freshwater Fish Directive requires the designation of waters needing protection or improvement in order to support fish life. They are divided into two categories: suitable for salmonids (salmon & trout) and suitable for cyprinids (coarse fish). The length of designated rivers in Northern Ireland is 4,154 km of salmonid rivers and 126 km of cyprinid rivers. These rivers are monitored and compliance is measured against water quality standards set by the Directive. In 2012, 2.8 per cent of salmonid river length failed to meet the standards set by the Directive, compared to 10 per cent failure recorded in 2005. For cyprinid, 28 per cent of river length met the Directive standards in 2012, compared to the 27 per cent of river length failure recorded in 2005.

Forestry

In Northern Ireland the state owned forest area has changed little since 1995. Following the introduction of a new Woodland Register the area of 'privately owned forest area' is estimated to be 44 and 49 thousand hectares in 2012 and 2013, respectively. Privately-owned forest area data for the years prior to 2011/12 are now thought to be under-estimates. In 2013, the volume of timber produced by state forests dropped by 8.0 per cent compared to 2012.

The area of woodland in the UK has increased over the past century. Approximately 5.0 per cent of the UK was covered by woodland in 1924; in 2005 almost 12 per cent of the UK was wooded.

Figure 6.3 Total greenhouse gas emissions in Northern Ireland by sector, 1990 & 2010



Source: Greenhouse Gas Inventories for England, Scotland, Wales and Northern Ireland: 1990-2010. The report is compiled annually on behalf of the UK Government's Department for Energy and Climate Change and the devolved administrations.

Table 6.11 Area of Farmland in Northern Ireland under Agri-Environmental Schemes

'000 hectares

Country	2008	2009	2010	2011	2012	2013
Organic Farming Scheme	6	7	5	3	2	2
Countryside Management Scheme	315	352	351	333	350	295
New Environmentally Sensitive Area Scheme	122	109	108	107	103	91

1. Source: Countryside Management Division, DARD.

Table 6.12 Organic and in-conversion agricultural land area[1]

thousand hectares

Country	1998	2003	2008	2009	2010	2011	2012
Northern Ireland	…	8	13	13	15	12	10
Wales	…	58	125	125	123	123	120
Scotland	…	372	231	221	189	170	152
England	…	257	375	379	392	351	324
UK	79	695	744	739	718	656	606

1. Source: DEFRA.

Table 6.13 Percentage of river water-bodies achieving Water Framework Directive classifications overall[1,2]

Percentage of river water-bodies

Classification	2009	2010	2011	2012
High	1.0	1.9	0.4	0.5
Good	24.3	19.8	22.8	21.7
Moderate	44.9	49.9	49.7	54.4
Poor	24.7	24.0	23.1	19.8
Bad	4.9	4.0	3.7	3.1
No data	0.2	0.3	0.3	0.3

1. Source: NIEA Northern Ireland Environmental Statistics Report March 2014.
2. The river waterbody classification has been produced using the results from the EU Water Framework Directive quality elements. Overall classification utilises a combination of biological, chemical and hydromorphological quality elements including macroinvertebrates, pH (measure of acidity or alkalinity of a solution) and ammonia to assign status of river quality in one of five classes from 'high' through to 'bad'.

Table 6.14 Freshwater Fish Directive compliance failure summary[1,2]

Unit: Percentage river length fail hectares

Country	2007	2008	2009	2010	2011	2012
Salmonid	13.2	5.7	7.7	6.3	9.6	2.8
Cyprinid	27.0	22.0	12.7	0.0	36.7	27.6

1. Source: NIEA Northern Ireland Environmental Statistics Report March 2014.
2. The EU Freshwater Fish Directive requires the designation of waters needing protection or improvement in order to support fish life. They are divided into two categories: suitable for salmonids (salmon & trout) and suitable for cyprinids (coarse fish). The majority of designated rivers are made up of salmonid rivers, 4,154 km, with cyprinid rivers accounting from the remaining 126 km. These rivers are monitored and compliance is measured against water quality standards set by the Directive.

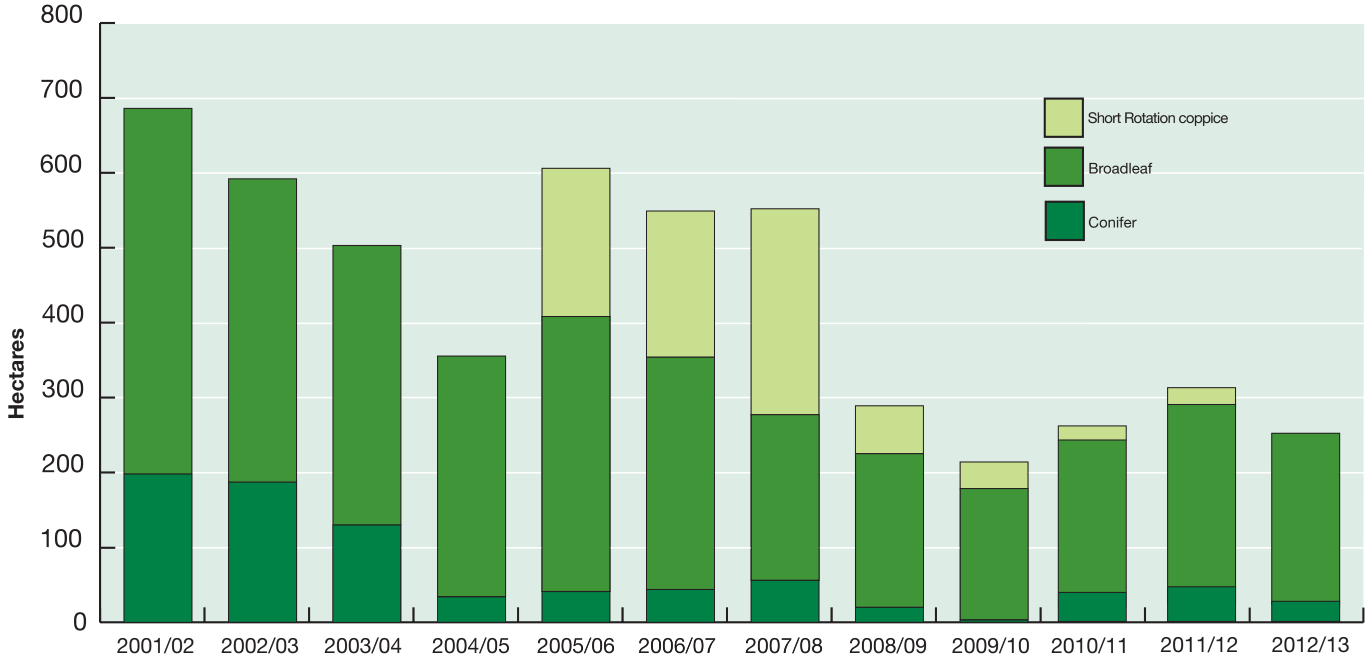
Table 6.15 Forestry area, production, forest park visitor numbers and employment in Northern Ireland

	1995/96	2000/01	2005/06	2010/11	2011/12	2012/13
Forested area (000ha)						
State	61	61	61	61	62	62
Private	19	22	25	27	44[1]	49[1]
All forested areas	**80**	**83**	**86**	**88**	**106**[1]	**111**[1]
Timber production from state forests						
Volume (000 cubic metres)	223	359	387	496	460	423
Visitors to Forest Parks						
Day Visitors (000's)	…	…	370	393	364	282
Employees (number) Forest Service	460	360	288	222	214	210

Source: Forest Service, DARD

1. The Forest Service introduced a new Woodland Register in 2011/12 and this has identified more privately owned woodland than the previous measurement approach. Note that the data from 2011/12 onwards for 'Private' forested area is not comparable to data for previous years.

Figure 6.4 Area of new forest and woodland plantings by private landowners supported by grant aid



Source: Forest Service, DARD.

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.

(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.

(iii) Rent paid on 'conacre' (short-term lettings) to non-farming persons is included as an expense.

(iv) Capital formation in, and depreciation of, breeding livestock is 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.

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 all farm families in NI is given by to**tal 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 2013 would change by almost ±11 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 2013 presented in this *Review* are estimates based on data available during the period from December 2013 to January 2014, in most cases covering only the first 9-11 months of the year (2013). However, for some items less information was available. 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 2012 figures have been revised as more complete information has become available. Net value added in 2012 is now estimated at £389.5 million (previously £320.7 million) while total income from farming for 2012 is now estimated at £222.9 million (previously £143.4 million). A 30-year plus consistent series of the AAA is available on the DARD website at www.dardni.gov.uk.

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 and 2010 a full census of every farm was conducted. In 2013 forms were issued to all the larger businesses but to only half those classified as ‘Very Small’ unless they had mushrooms.

For those who did not return a form, 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 2013 return was not obtained, estimates were based on the IACS and other administrative systems. Owners of horticultural or mushroom enterprises who failed to make a return in 2013 were contacted by telephone in order that up to date information could be obtained. In 2013 data for pigs was sourced from the NI Annual Inventory of Pigs.

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.
2001-2006	A sample survey was carried out on the same basis as that conducted in 1999.
2007-2009	A sample survey was carried out. The number of cattle questions on the survey form were reduced as data was sourced primarily from APHIS (Animal and Public Health Information System) to determine cattle numbers. No poultry questions were asked, with data on poultry being sourced from the Northern Ireland Bird Register Update.
2010	A full census of all farm businesses in Northern Ireland was carried out.
2011 -2012	Sample survey completed similar to years 2007-2009.
2013 on	Sample survey completed similar to 2011-2012. Pig questions removed from paper form. Data on pigs sourced from NI Annual Inventory of Pigs.

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 on page 82.

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[1]

The system of classifying farms according to the type of farming found on a holding is set out in Commission Regulation (EC) 1242/2008 and explained in greater detail in the EU Farm Accountancy Data Network (FADN) Typology Handbook RI/CC 1500 rev.3.

Depending on the amount of detail required, farms can be classified into 1 of 62 types. Individual farms are allocated to a type category on the basis of the aggregate value of farm outputs. As it is not feasible to estimate the value of outputs on a farm-by-farm basis, Standard Outputs (SOs) are calculated as reference values for a variety of farm products. The SO of a specific product (crop or livestock) is the average monetary value (per ha or head) of agricultural output based on regional farm-gate prices over a 5 year period. The SO excludes direct payments and no costs are deducted. Once the numbers of livestock and hectares of crop for an individual farm have been multiplied by the relevant SOs, it is allocated to a type category depending on where most of the total SO comes from. To ensure a stable framework for comparison and analysis SO values, once calculated, are held constant for a number of years. The SO values in use at the moment cover the five year period centred on 2007.

For UK statistical purposes, the 62 farm types (not all of which are found in Northern Ireland) are grouped into 10 'robust' categories which have particular relevance to UK conditions.

1. The EU typology in operation between 1985 and 2010 classified farms based on the distribution of Standard Gross Margin (SGM) between enterprises. The impact of the change from SGM to SO can be seen at Annex 1 of the Agricultural Census in Northern Ireland publication.

These are:

Type	Definition
Cereals	Farms on which cereals and combinable crops account for more than two-thirds of the total SO.
General cropping	Farms which do not qualify as cereals farms but but have more than two-thirds of the total SO in arable, including field scale vegetable, crops or in a mixture of arable and horticultural crops where arable crops account for more than one-third of the total SO and no other grouping accounts for more than one-third. In addition, farms with a substantial area of grassland but few livestock are also included within this farm type.
Horticulture	Farms with more than two-thirds of the total SO in horticultural crops (including specialist mushroom growers).
Specialist pigs	Farms of which pigs account for more than two-thirds of total SO.
Specialist poultry	Farms on which poultry account for more than two-thirds of total SO.
Dairy	Farms on which dairy cows account for more than two-thirds of the total SO.
Grazing livestock (LFA)	Farms wholly or mainly in the Less Favoured Area which do not qualify as Dairy farms but have more than two-thirds their total SO in grazing livestock (cattle and sheep).
Grazing livestock (Lowland)	Farms wholly or mainly outside the Less Favoured Area, which do not qualify as Dairy farms but have more than two-thirds their total SO in grazing livestock (cattle and sheep).
Mixed	Farms that have no dominant enterprise and do not fit into the above categories.
Other types	Farms that specialise in enterprises which do not fit the definitions of mainstream agricultural activities. For the most part this category is made up of specialist horse farms plus other farms that are unclassified.

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 Farm Business Survey (FBS) is a continuous annual survey that monitors the physical and financial performance of farm businesses in Northern Ireland. The survey is carried out by Policy and Economics Division of the Department of Agriculture and Rural Development. Similar surveys are carried out in England by DEFRA, in Scotland by Scottish Government, and in Wales by WAG. These surveys along with the Northern Ireland FBS constitute the UK's contribution to the Farm Accounts Data Network (FADN) of the European Union which was established under EC regulation 79/65.

In the most recent accounting year, 2011/12, the FBS obtained farm accounts information from 387 businesses. This accounting information enables outputs, inputs and incomes 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 incomes are derived by linking the results of identical samples from successive pairs of years (Table 5.1).

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, whereas, the AAA covers the whole agricultural sector. The FBS account years end between October and May, with an average account ending date of mid-February, while the AAA relates to calendar years. Farm Business Income includes changes in both the volume and price of crops and non-breeding livestock in accounting for stock changes, whereas the AAA includes volume changes only. 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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