

POLICY, ECONOMICS AND STATISTICS DIVISION

Northern Ireland Agri-Food Sector

Key Statistics July 2019



Agriculture, Fishing & Forestry



A living, working, active landscape valued by everyone



Department of
**Agriculture, Environment
and Rural Affairs**

www.daera-ni.gov.uk

Northern Ireland Agri-Food Sector
Key Statistics
July 2019

Key Facts on
Agriculture,
Fishing and Forestry

Prepared by:
David Playfair
Policy, Economics and Statistics Division
DAERA

List of Contents

TABLES	PAGE
Table 1: General economic data	3
Table 2: Agriculture: general data, 2018	4
Table 3: Agriculture in NI: structural adjustment, 1998, 2008 and 2016 - 2018	4
Table 4: Agri - food sector GVA and employment, 2018	5
Table 5: Distribution of farm outputs in NI and share of UK totals, 2018	5
Table 6: NI food and drink processing sector - gross turnover, value added, employment by subsector, external and export sales, 2017	6
Table 7: Total income from farming, NI and UK, 2018	8
Table 8: Average income by type of farm, NI, 2016/17 and 2017/18	8
Table 9: Net farm, Farm Business, and Cash income for dairy, LFA cattle & sheep and mixed farms throughout the UK, 2016/17 and 2017/18	8
Table 10: Number of farms in the UK by size and country, 2018	9
Table 11: Percentage distribution of farms in the UK by size and country, 2018	9
Table 12: Number of farms in NI by size and type, 2018	9
Table 13: Crop areas and livestock numbers, NI, 1998, 2008, and 2016 - 2018	10
Table 14: Average size of enterprise, NI, 1998, 2008 and 2016 - 2018	11
Table 15: Number of farmers and workers, NI, 1998, 2008 and 2016 - 2018	12
Table 16: Liveweight and estimated value of recorded landings of fish into NI, 2015 - 2018	13
Table 17: Employment in NI fishing industry, 2015 - 2018	14
Table 18: Area of woodland throughout the UK by forest type, 2018	14
Table 19: Number of farms using agricultural contractors in 2016	15
Table 20: Percentage of farms using agricultural contractors by business size in 2016	15
Table 21: Number of farms using agricultural contractors from 2007-2016	15
 FIGURES	
Figure 1: Trend in GVA per head in each UK region, 2004 - 2017	3
Figure 2: Population per 100 ha of Utilised Agricultural Area (JAA), 2017	4
Figure 3: Gross turnover and full time equivalent (FTE) workforce by food processing subsector in NI, 2017	6
Figure 4: Proportion of gross turnover by subsector in NI, 2017	7
Figure 5: Proportion of employee jobs by Industry section, December 2018	7
Figure 6: Trend in dairy and beef cow numbers, NI, 2003 - 2018	10
Figure 7: Average size of selected livestock enterprises, NI, 2003 - 2018	11
Figure 8: Full - time labour on NI farms, 1998, 2008 and 2016 - 2018	12
Figure 9: Estimated value of recorded landings of fish into NI 2009 - 2018	13
Further information	16

Table 1: General economic data

	NI	Scotland	Wales	England	UK	EU 27
GVA per head (£, 2017)	21,237	25,685	19,705	27,949	27,430	19,402 ²
Population ('000, 2017)	1,871	5,425	3,125	55,619	66,040	507,219 ^P
Area (sq. km)	13,588	77,911	20,736	130,310	242,545	4,312,826 ¹
Population Density (per sq. km, 2017)	138	70	151	427	272	118
Bank Base interest rate (% , June 2019)					0.75	
RPI (% change, April 2018 - April 2019)					3.0	
Unemployment rate (% , Quarter 1 2019)	2.9	3.3	4.5	3.8	3.8	6.8

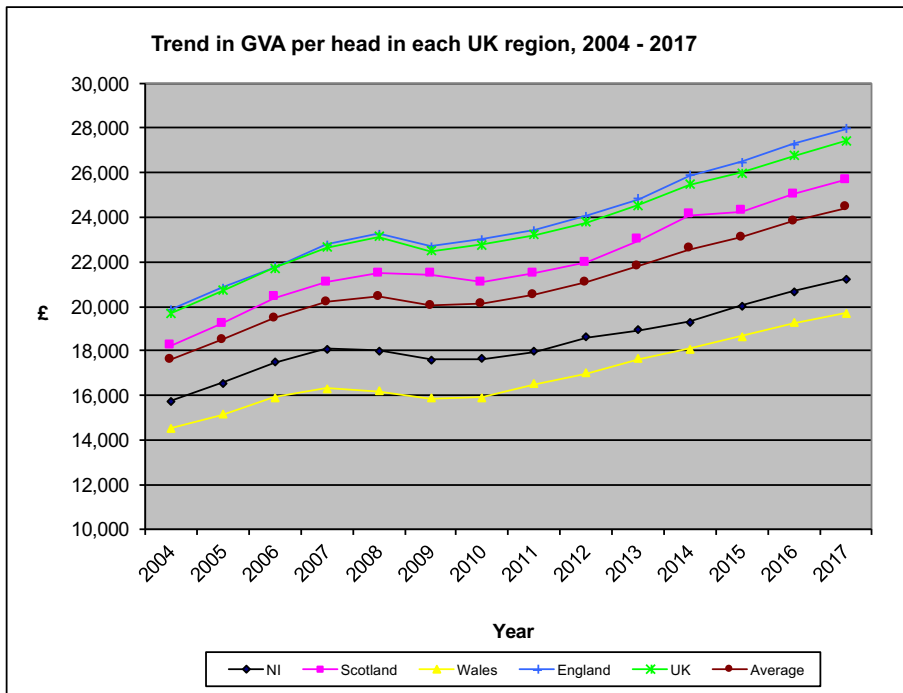
Unemployment rates are not seasonally adjusted and taken from the Labour Force Survey (LFS). EU27 figure from Eurostat.

GVA - Gross Value Added (at basic prices)

RPI - Retail Price Index

1. 2015, 2. 2013 P. Provisional estimate

Figure 1 - Trend in GVA per head in each UK region, 2004 - 2017



Note: GVA is in current basic prices

Figure 2 - Population per 100 ha of Utilised Agricultural Area (UAA), 2017

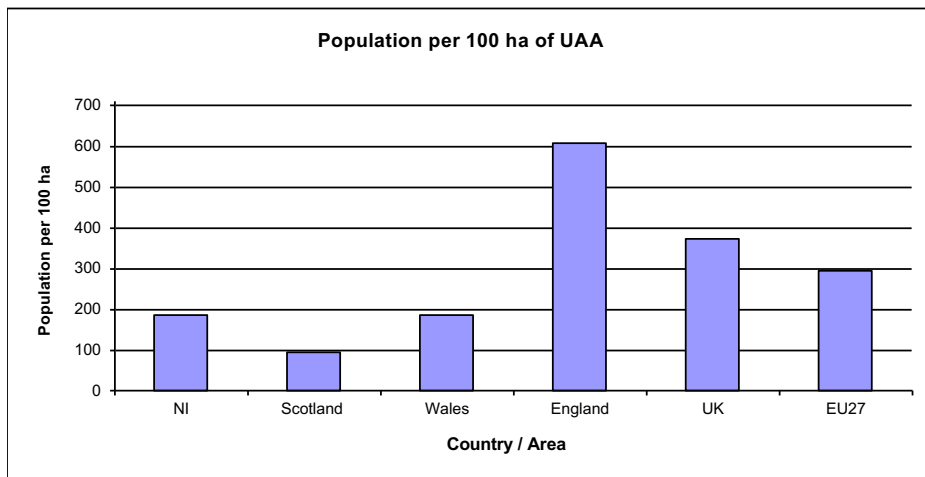


Table 2: Agriculture: general data, 2018

	NI	Scot	Wales	Eng	UK	ROI	EU27
Share of total GVA (%)	1.4	0.9 ¹	0.8 ¹	0.5 ¹	0.6 ¹	1.3 ¹	1.7 ³
No. employed in agriculture forestry & fishing ('000)	24	44	33	249	350	105 ⁶	9,094
Share of employment (%)	2.8 ⁵	1.7 ⁵	2.3 ⁵	0.9 ⁵	1.1 ⁵	4.6 ⁶	4.0
Number of farms ('000)	25	51	36	106 ¹	217 ¹	138 ²	10,684 ³
Average farm size (Ha)	41	121	44	87 ¹	81 ¹	32 ²	16 ³
LFA (% Agricultural area)	70	86	80	19 ¹	51 ¹	75 ⁴	51 ⁴

1. 2017, 2. 2016, 3. 2013, 4. 2007

5. % of total LFS employment (848,000 in NI, 2,638,000 in Scotland, 1,459,000 in Wales, 27,224,000 in England, 32,169,000 in UK at 2018)

6. CSO Labour Force Survey, 4th quarter, 2018

Due to National Accounting principles, GVA figures do not include Direct Subsidy Receipts

Source for UK employment data (SIC 2007, main job) - Labour force survey (2018)

Table 3: Agriculture in NI: structural adjustment, 1998, 2008 and 2016-2018

	1998	2008	2016	2017	2018	
Number of farms	31,817	25,952	24,528	24,956	24,895	
Average farm size (Ha)		33.6	39.2	41.3	40.9	41.1
Total farmers and workers	61,339	48,964	47,712	48,704	49,248	

Table 4: Agri - food sector GVA and employment, 2018

	NI		UK	
	£m	% of GVA	£m	% of GVA
Gross value added¹				
Agriculture	553	1.4	9,586 ³	0.5 ³
Food and drink processing	904 ²	2.3 ²	26,075 ³	1.5 ³
Employment	'000 persons	% of total employment	'000 persons	% of total employment
Agriculture, forestry and fishing	24	2.8 ⁴	350	1.1 ⁵
Food and drink processing ⁷	16 ⁶	1.8 ⁴	371	1.2 ⁵

1. GVA figures are at basic prices.

2. Size and Performance of the NI Food and Drinks Processing Sector, Subsector Statistics, 2017. This excludes the value added of those food and drinks processing businesses with a turnover of less than £250,000.

3. UK GVA agriculture are 2018 provisional figures. UK GVA food and drink processing are 2016 figures.

4. % of total LFS employment (848,000 in NI at 2018)

5. % of total LFS employment (32,169,000 in UK at 2018)

6. Please note that the 95% confidence interval for this figure ranges from 12,000 to 19,000

7. Includes SIC 2007 10.11 - 11.07

Table 5: Distribution of farm outputs in NI and share of UK totals, 2018

	% of NI total		NI output as % of UK output	
	Gross output	Gross Margin	On farm employment	
Enterprise	%	%	%	%
Dairy	31.9	51.9	20	15.2
Cattle	21.9	16.5	50	15.4
Sheep & wool	3.7	4.2	16	6.2
Pigs	7.4	6.2	} 5	12.7
Poultry & eggs	18.2	6.6		11.9
Cereals & other crops	2.1	3.7	} 9	0.9
Potatoes	1.0	1.7		3.2
Horticulture	5.0	8.3		3.0
Others	8.8	0.9		4.7
Total	100.0	100.0	100	8.0

Source: Aggregate Agricultural Account. Employment data from June 2018 Agricultural Survey.

Table 6: NI food and drink processing sector - gross turnover, value added, employment by subsector, external and export sales, 2017

Subsector	Gross turnover	Value added	Employees ¹	External ² Sales	Export Sales ³
	£m	£m		£m	£m
Animal by-products	53	11	112	*	*
Bakeries	329	111	3,936	165	99
Beef and sheepmeat	1,312	172	5,116	1,151	223
Drinks	389	102	1,295	228	195
Eggs	175	29	418	119	13
Fish	94	18	643	80	35
Fruit and vegetables	337	84	2,537	223	64
Milk and milk products	1,068	117	2,222	776	*
Pigmeat	343	59	1,725	201	90
Poultrymeat	709	201	5,639	*	*
Total	4,810	904	23,641	3,531	1,260

1. Full - time equivalents. This is an estimation of the total direct employment in the sector, as some workers are provided by employment agencies and not shown in these figures. The July 2019 edition of the Size and Performance publication presented an estimation of agency employment in 2017 at 2,785 full-time equivalents.

2. Sales outside NI

3. Sales outside UK

Source: Size and Performance of the Northern Ireland Food and Drinks Processing Sector, Subsector Statistics, 2017 with provisional estimates for 2018. These figures exclude those food and drinks processing businesses with a turnover of less than £250,000.

Figure 3 - Gross turnover and full time equivalent (FTE) workforce by food processing subsector in NI, 2017

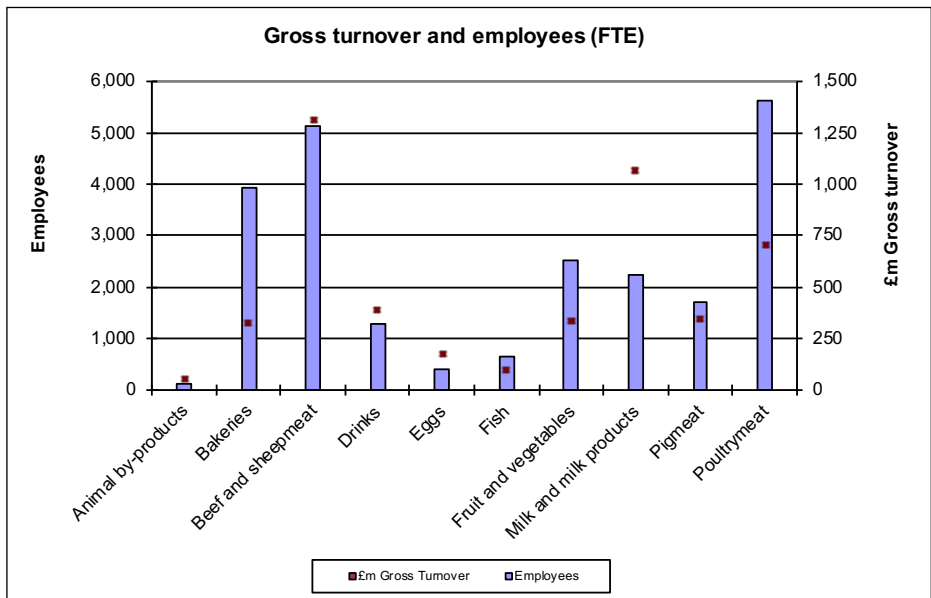


Figure 4 - Proportion of gross turnover by subsector in NI, 2017

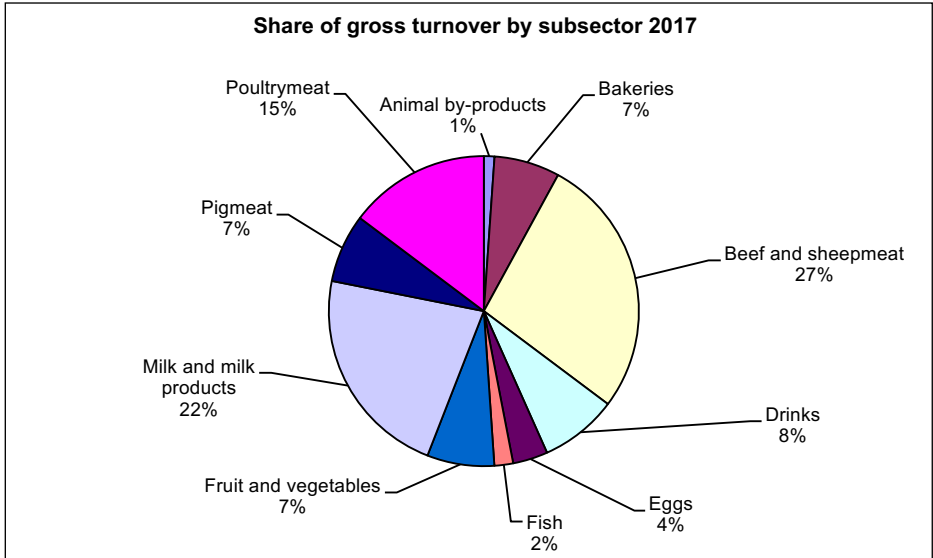


Figure 5 - Proportion of employee jobs by Industry section, December 2018

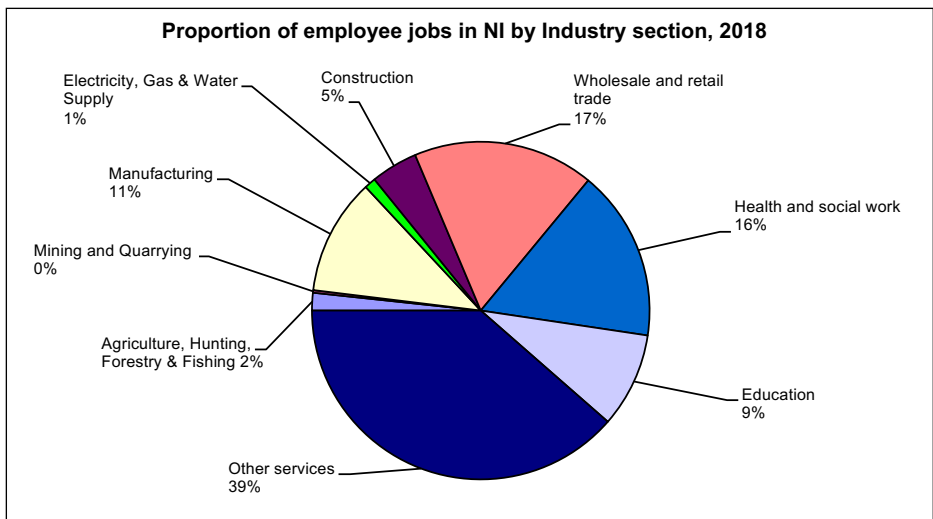


Table 7: Total income from farming, NI and UK, 2018

	NI	UK
Total income from farming (£)	£360m	£4,697m
% change on previous year :		
Current prices	-23%	-17%
Real terms	-24%	-18%

Source: Aggregate Agricultural Account

Note: For an explanation of the change in TIFF in NI and UK see Chapter 1 of the Statistical Review of NI Agriculture 2018 and Chapter 3 of Agriculture in the UK 2018.

Table 8: Average income¹ by type of farm, NI, 2016/17 and 2017/18

Type of farm:	Net farm income ²		Farm Business Income ³		Cash income ⁴	
	2016/17	2017/18	2016/17	2017/18	2016/17	2017/18
Cereals	7,172	23,749	12,656	26,980	70,951	64,956
Dairy	22,844	64,733	22,809	68,148	56,280	99,119
Cattle & sheep (LFA)	13,054	11,850	18,945	17,725	29,073	28,592
Cattle & sheep (Lowland)	6,206	7,447	15,817	16,637	25,794	33,945
Mixed	23,661	40,457	28,234	44,914	53,926	82,862

Source: Farm Business Survey in Northern Ireland 2016/17 and 2017/18

1. Based on information gathered from farms over 0.5 Standard Labour Requirements

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

3. Farm Business income is the return to all unpaid labour and to their capital invested (inc land and buildings) in the business

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

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

Table 9: Net farm income, Farm Business Income and Cash Income for dairy, LFA cattle & sheep, and mixed farms throughout the UK, 2016/17 and 2017/18

	Dairy		LFA Cattle & Sheep		Mixed	
	2016/17	2017/18	2016/17	2017/18	2016/17	2017/18
Net farm income						
England	33,700	102,100	16,600	18,100	11,300	25,100
Wales	18,125	69,057	12,634	15,474	-	-
Scotland	36,050	74,925	31,489	25,728	9,228	10,332
NI	22,844	64,733	13,054	11,850	23,661	40,457
Farm Business Income						
England	50,000	119,700	27,000	28,300	28,800	41,800
Wales	31,280	82,381	23,081	26,899	-	-
Scotland	41,456	73,144	37,916	32,649	23,283	29,051
NI	22,809	68,148	18,945	17,725	28,234	44,914
Cash income						
England	78,500	152,900	37,100	40,000	59,600	72,700
Wales	58,165	115,054	35,952	42,064	-	-
Scotland	58,501	111,850	52,998	47,715	44,391	48,083
NI	56,280	99,119	29,073	28,592	53,926	82,862

Source: Farm Business Survey in Northern Ireland 2016/17 and 2017/18

Note: All regions define farm types using Standard Output Methodology. All regions use 2010SO averages.

Note: England figures to nearest £100

Note: Scotland figures methodology has changed this year. Take care when comparing with previous years.

Table 10: Number of farms in the UK by size & country, 2018

	Business size (SLR) ¹				Total
	Very small	Small	Medium	Large / Very Large	
Farms					
NI	19,188	2,824	1,190	1,693	24,895
England ²	67,692	14,783	7,840	15,610	105,925
Scotland	40,499	3,075	1,851	5,732	51,157
Wales ³	27,189	3,201	1,841	3,440	35,671
Total	154,568	23,883	12,722	26,475	217,648

1. Standard Labour Requirements

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

Note England figures are 2017 figures as newer data not available at time of publication.

3. Excludes holdings with a SLR of zero

Table 11: Percentage distribution of farms in the UK by size & country, 2018

	Business size (SLR)				Total
	Very small	Small	Medium	Large / Very Large	
Farms (%)					
NI	77	11	5	7	100
England ¹	64	14	7	15	100
Scotland	79	6	4	11	100
Wales	76	9	5	10	100
Total	71	11	6	12	100

1. Note England figures are 2017 figures as newer data not available at time of publication.

Table 12: Number of farms in NI by size and type, 2018

Business type	Business size (SLR)				All sizes
	Very small	Small	Medium	Large	
Cereals	207	41	9	7	264
General cropping	481	34	21	38	574
Horticulture	83	51	25	105	264
Pigs	55	22	30	70	177
Poultry	177	236	115	111	639
Dairy	262	703	584	996	2,545
Cattle and sheep (LFA)	13,199	1,130	218	153	14,700
Cattle and sheep (Lowland)	4,381	505	128	95	5,109
Mixed	263	88	44	108	503
Others	80	14	16	10	120
All types	19,188	2,824	1,190	1,693	24,895

Source: June 2018 Agricultural Survey

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

Table 13: Crop areas and livestock numbers, NI, 1998, 2008 and 2016 - 2018

	1998	2008	2016	2017	2018
Livestock ('000 head)					
Cattle					
Dairy cows	287.7	289.2	317.1	315.8	310.7
Beef cows	344.7	265.7	269.7	267.1	255.9
Total cattle	1,767.3	1,622.5	1,664.6	1,666.4	1,629.1
Sheep					
Breeding ewes	1,449.8	935.4	955.2	973.3	956.5
Total sheep	2,986.6	1,973.6	2,023.0	2,052.6	2,006.0
Pigs					
Female Breeding pigs	66.9	35.5	46.4	47.9	49.6
Total pigs	653.4	402.4	601.1	649.1	633.6
Poultry					
Laying flock	2,562.1	2,398.5	3,550.0	3,962.8	4,331.9
Broilers	8,854.1	11,543.5	14,459.2	16,766.6	17,663.0
Crops ('000 hectares)					
Cereals	44.7	40.4	33.4	32.3	29.7
Potatoes	7.5	15.0	3.7	4.1	3.6
Horticultural crops	3.2	3.0	2.9	3.0	2.8

Source: June Agricultural Survey

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

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

From 2013 onwards, pig figures derived from the Northern Ireland Annual Inventory of Pigs

Figure 6 - Trend in dairy and beef cow numbers, NI, 2003 - 2018

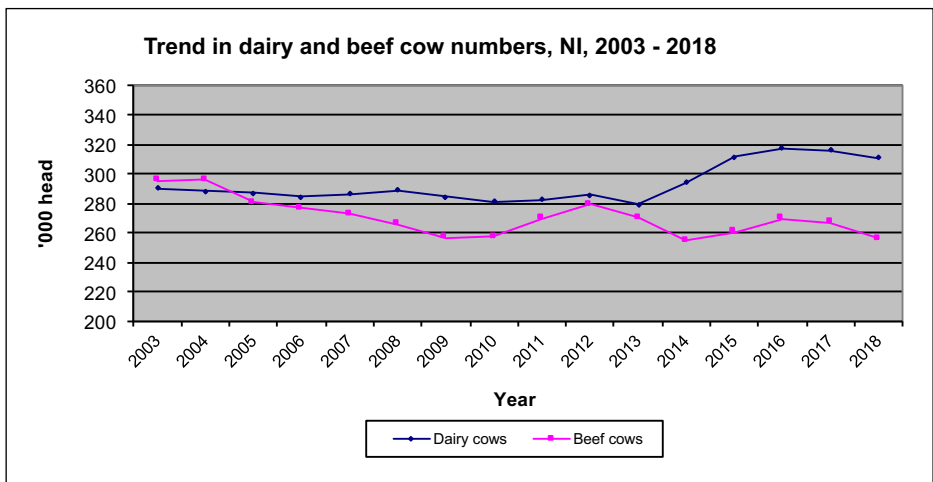


Table 14: Average size of enterprise, NI, 1998, 2008 and 2016 - 2018

	1998	2008	2016	2017	2018
Average livestock numbers (per herd/flock)					
Dairy cows	51	73	90	92	94
Beef cows	19	16	18	18	18
Total cattle	66	77	83	82	81
Ewes	126	109	100	100	98
Total sheep	256	225	206	206	201
Sows	35	96	158	165	180
Total pigs	305	825	1,784	2,016	2,037
Total poultry (farms with 500 or more birds)	21,525	26,582	29,753	33,123	33,846
Average cropping areas (ha)					
Cereals	10	13	15	15	15
Potatoes	5	7	8	8	8

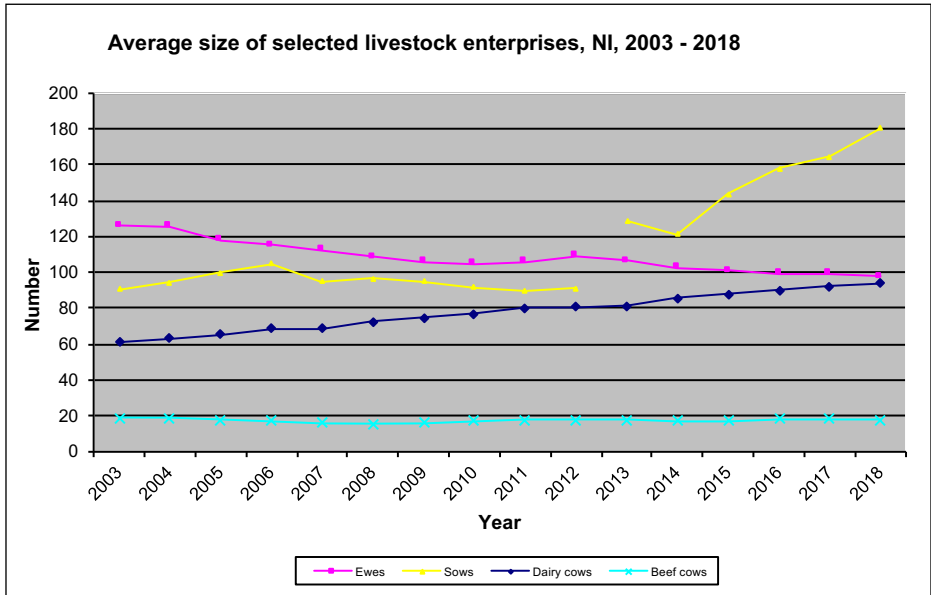
Source: June Agricultural Survey

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

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

From 2013 onwards, pig figures derived from the Northern Ireland Annual Inventory of Pigs

Figure 7 - Average size of selected livestock enterprises, NI, 2003 - 2018



Note: From 2013 onwards, pig figures derived from the Northern Ireland Annual Inventory of Pigs

Table 15: Number of farmers and workers, NI, 1998, 2008 and 2016 - 2018

	1998	2008	2016	2017	2018
Farmers, partners & directors:					
Full-time	22,524	16,931	16,233	16,760	16,964
Part-time	16,503	14,166	13,571	13,586	13,721
Total	39,027	31,097	29,804	30,346	30,685
Spouses	7,056	6,229	6,410	6,449	6,542
Other workers					
Full-time	2,935	3,089	3,209	3,441	3,411
Part-time	2,940	2,803	4,215	4,319	4,340
Casual/Seasonal	9,381	5,746	4,074	4,149	4,270
Total other workers	15,256	11,638	11,498	11,909	12,021
Total agricultural labour force	61,339	48,964	47,712	48,704	49,248

Source: June Agricultural Survey

Figure 8 - Full-time labour on NI farms, 1998, 2008 and 2016 - 2018

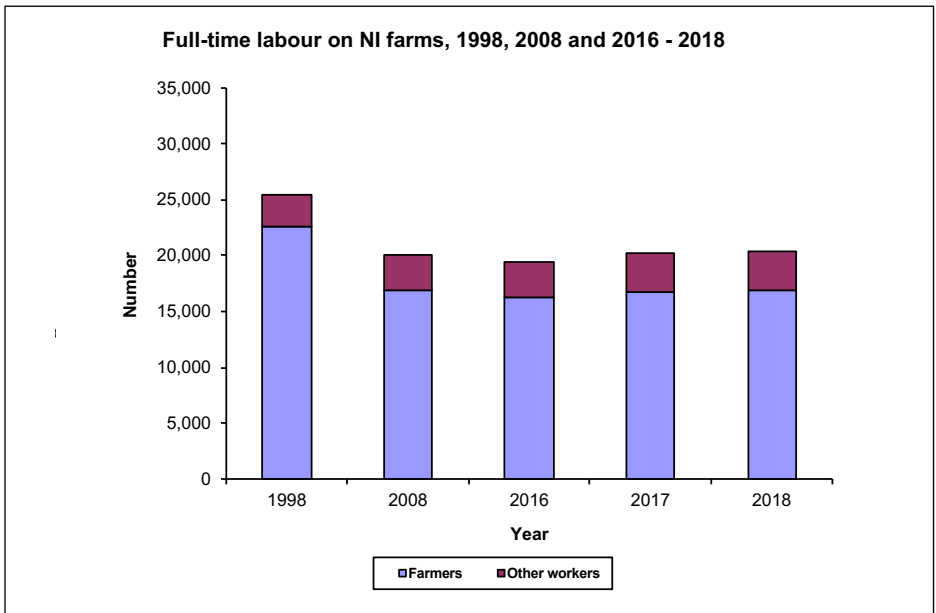


Table 16: Liveweight and estimated value of recorded landings of fish into NI, 2015 - 2018

	2015		2016		2017		2018	
	Tonnes	£ ('000)	Tonnes	£ ('000)	Tonnes	£ ('000)	Tonnes	£ ('000)
Total wet fish	10,253	6,078	13,606	9,459	11,791	10,433	13,965	10,113
Total shell fish	12,248	22,111	10,672	22,581	9,596	20,925	8,452	17,553
Total fish	22,501	28,190	24,279	32,040	21,387	31,358	22,417	27,666

Source: Marine and Fisheries Division, DAERA

Figure 9 - Estimated value of recorded landings of fish into NI, 2009 - 2018

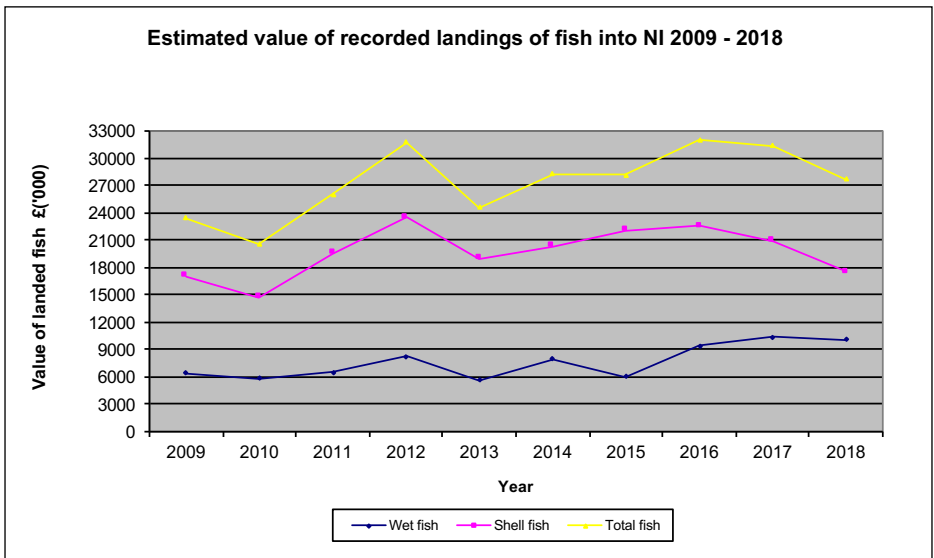


Table 17: Employment in NI fishing industry, 2015 - 2018

	2015		2016		2017		2018	
	Full Time	Part Time	Full Time	Part Time	Full Time	Part Time	Full Time	Part Time
Catching	708	151	700	175	686	152	686	168
Processing and marketing	484	232	516	241	530	242	618	263
Others	112	46	113	47	126	56	118	58
Total	1,304	429	1,329	463	1,342	450	1,422	489

Source: Marine and Fisheries Division, DAERA

Table 18: Area of woodland throughout the UK by forest type, 2018

	Conifers ('000 HA)	Broadleaves ('000 HA)	Total ('000 HA)	% of Total Land Area in Forestry
United Kingdom	1,622	1,551	3,173	13.1%
England	340	968	1,307	10.0%
Scotland	1,064	380	1,445	18.5%
Wales	151	157	308	14.9%
Northern Ireland	66	46	113	8.3%

Source: Forestry Commission

Table 19: Number of farms using agricultural contractors in 2016

	Very Small	Small	Med/Large	All
Hay/Silage Making	14,043	2,096	2,015	18,154
Crop Harvesting	990	307	518	1,815
Spreading slurry/fertilisers etc	7,559	1,399	1,639	10,597
Other field work	2,601	568	715	3,884
Milking	65	117	255	437
Sheep shearing	4,697	884	572	6,153
Other livestock work	1,253	218	208	1,679
Hedge cutting	11,891	2,030	1,890	15,811

Source: EU Farm Structure Survey 2016, NI

Table 20: Percentage of farms using agricultural contractors by business size in 2016

	Very Small	Small	Med/Large	All
Hay/Silage Making	75	71	69	74
Crop Harvesting	5	10	18	7
Spreading slurry/fertilisers etc	41	48	56	43
Other field work	14	19	24	16
Milking	0	4	9	2
Sheep shearing	25	30	19	25
Other livestock work	7	7	7	7
Hedge cutting	64	69	64	64

Source: EU Farm Structure Survey 2016, NI

Table 21: Number of farms using agricultural contractors from 2007-2016

	2007	2010	2013	2016
Hay/Silage Making	18,015	16,787	17,514	18,154
Crop Harvesting	1,979	1,932	2,023	1,815
Spreading slurry/fertilisers etc	10,500	10,257	10,520	10,597
Other field work	3,749	3,613	3,742	3,884
Milking	599	443	415	437
Sheep shearing	4,432	3,877	5,417	6,153
Other livestock work	1,474	1,178	1,363	1,679
Hedge cutting	14,705	13,905	15,007	15,811

Source: EU Farm Structure Survey 2016, NI

Further information

1. Northern Ireland

Department of Agriculture, Environment and Rural Affairs (DAERA), www.daera-ni.gov.uk
www.daera-ni.gov.uk/topics/statistics

Agricultural Census in N.I. 2018 publication (ISBN no. 978-1-84807-934-2)

Statistical Review of N.I. Agriculture 2018 publication (ISBN no. 978-1-84807-941-0)

Size and performance of the N.I. Food and Drinks Processing Sector publication 2016
(ISBN no. 978-1-84807-895-6)

EU Farm Structure Survey 2016 (ISBN no. 978-1-84807-798-0)

Farm Incomes in N.I. publication

Food consumption and expenditure information

Fisheries statistics

Forestry statistics

2. United Kingdom

Department of Environment, Food and Rural Affairs (DEFRA), www.gov.uk/defra
www.gov.uk/government/collections/agriculture-in-the-united-kingdom

GOV.UK statistics release calendar
www.statistics.gov.uk

3. Republic of Ireland

Department of Agriculture, Food and the Marine, www.agriculture.gov.ie
www.agriculture.gov.ie/

Central statistics office Ireland, www.cso.ie
www.cso.ie/en/statistics/agriculture/

Ireland's Open Data Portal, <https://data.gov.ie/>
<https://data.gov.ie/dataset?theme=Agriculture>

4. European Union

Eurostat, www.ec.europa.eu/eurostat
<http://ec.europa.eu/eurostat/web/agriculture/overview>

Policy, Economics and Statistics Division
Department of Agriculture, Environment and
Rural Affairs
Dundonald House
Upper Newtownards Road
Ballymiscaw
BELFAST
BT4 3SB

ISBN 978-1-83887-041-6



Department of
**Agriculture, Environment
and Rural Affairs**

www.daera-ni.gov.uk



**INVESTORS
IN PEOPLE**