

Quarter 3 (July-September) 2017

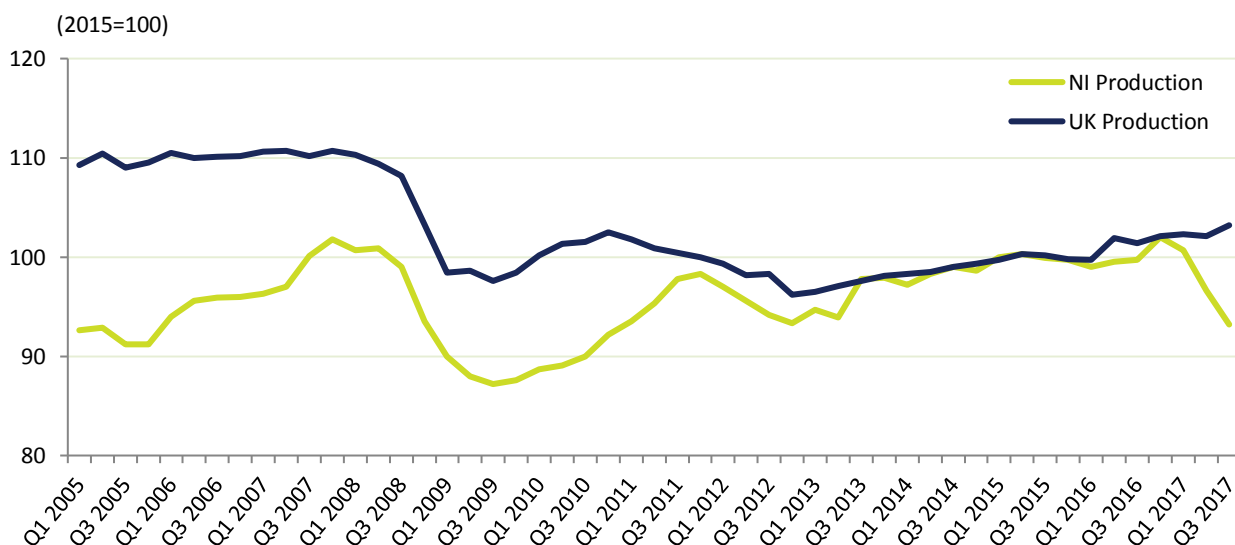
Northern Ireland Index of Production

Date: 13 December 2017
 Geographical Area: Northern Ireland
 Theme: Economy
 Frequency: Quarterly

Key Points

- Provisional results from the Index of Production (IOP) for the third quarter (July-September) of 2017 showed that output in Northern Ireland (NI) fell by 3.6% over the quarter and 6.5% over the year
- The quarterly and annual decline in production output is driven by a substantial decline in the Food, Beverages and Tobacco sub sector (18.1% fall over the quarter and 38.9% over the year)
- In the UK as a whole, production output rose over the quarter (1.1%) and year (1.8%)
- When the most recent four quarters are compared to the previous four quarters, output in the NI production sector fell by 1.4%, with the whole of the UK reporting growth on this basis of 1.7%
- Despite the fall in Quarter 3 2017, the output from the overall production industries (seasonally adjusted) is still 6.9% above the low point recorded in Quarter 3 2009

Figure 1: Index of Production, Northern Ireland and UK



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National Statistics

The United Kingdom Statistics Authority has designated these statistics as National Statistics, in accordance with the Statistics and Registration Service Act 2007 and signifying compliance with the Code of Practice for Official Statistics.

National Statistics status means that official statistics meet the highest standards of trustworthiness, quality and public value.

All official statistics should comply with all aspects of the Code of Practice for Official Statistics. They are awarded National Statistics status following an assessment by the Authority's regulatory arm. The Authority considers whether the statistics meet the highest standards of Code compliance, including the value they add to public decisions and debate.

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1 Introduction and context

This bulletin provides data which is collected from the Index of Production (IOP) aspect of the Quarterly Business Survey (QBS) for Northern Ireland. The IOP is one of the earliest official indicators of the performance of Northern Ireland industry and, as such, represents an important short-term measure of change in a significant area of the economy. The contents of this report will be of interest to government policymakers, Members of the Legislative Assembly, the business community, economic commentators, academics and members of the general public with an interest in the state of the NI economy. A summary of uses is available on the website at <https://www.nisra.gov.uk/publications/methodology-and-usage-iop>

The latest Department for the Economy (DfE) economic commentary (Summer 2017) provides an overview of the state of the Northern Ireland economy, setting it in context with the UK and Republic of Ireland. This can be found at <https://www.economy-ni.gov.uk/publications/dfe-economic-commentary>

The most up-to-date official statistics on the economy and labour market, including those published on the same day as the Northern Ireland Index of Services and Index of Production, are available on the economic overview page of the Northern Ireland Statistics and Research Agency (NISRA) website at <https://www.nisra.gov.uk/statistics/nisra-economic-and-labour-market-statistics-elms/economic-overview>

The separate Northern Ireland Index of Services (IOS) provides an important short-term measure of change in the output of the private services sector of the economy. It is based on up-to-date information about the output and sales of the services industry. Provisional figures for IOS for the third quarter of 2017 showed that output, in real terms, increased by 1.0% over the quarter and by 2.5% over the year. The services index has shown an increase over the year for the last 12 quarters, including Quarter 3 2017. Further information and results from the NI IOS can be accessed at <https://www.nisra.gov.uk/statistics/economic-output-statistics/index-services>

The Index of Production is published on a Standard Industrial Classification 2007 (SIC07) basis. This has an impact on the type of businesses classified as production sector. For example, publishing activities move from the production to the services sector and sewerage and waste disposal moves from services to the production sector. Within the production sector, there are some new groupings of businesses. IOP data prior to Quarter 2 2011 were collected on a SIC03 basis and it has been converted to approximate the SIC07 coverage. Further detail can be found in the background notes (section 8).

The background notes in Section 8 of this publication provide detailed information on the methodology used to produce the statistics as well as information on the quality and accuracy of the data. This bulletin contains detailed results for the production industries i.e. the mining & quarrying, the manufacturing, the electricity, gas, steam and air conditioning supply and the water supply, sewerage, waste management (inc. recycling) sectors on a 2015=100 basis. This data is seasonally adjusted (where stated).

Manufacturing is typically the main determinant of change in the production sector, representing 81.6% of the approximate Gross Value Added (GVA) in the production industries. The other elements of the index relate to water supply, sewerage and waste management (inc. recycling) which represents around 9.8% of the index; electricity, gas, steam and air conditioning supply which represents around 6.6% and mining and quarrying which represents around 2.0%.

Comparative UK data (produced by the Office for National Statistics) are presented where these are available. The latest ONS IOP results on a comparative 2015=100 basis are available at <http://www.ons.gov.uk/economy/economicoutputandproductivity/output/bulletins/indexofproducti on/previousReleases>

Information on the manufacturing sub-sectors (e.g. food, beverages, and tobacco) along with information by market sector (classifying production under one of three headings, according to the purpose for which output is intended i.e. investment goods, intermediate goods, and consumer goods) are included in the publication.

This publication provides three measures of growth for the Index. The quarter-on-quarter change provides the most recent measure of how the sector is changing. Consecutive quarters can be compared as the indices are seasonally adjusted, where appropriate, to remove the effects of changes in output as a result of the time of the year. We also provide comparisons with the same quarter one year ago and a comparison of the most recent twelve months with the twelve months before. The quarterly comparison over the year provides an additional control on seasonal effects. The comparison of the rolling annual average is useful for identifying changes in output over a longer period than the other two approaches.

Northern Ireland production

Revisions

Results are provisional and subject to revision as more up-to-date data become available (e.g. through late returns). Figures can also change as a result of the seasonal adjustment factors, methodological changes or changes to classifications.

Date of next publication

The next Northern Ireland Index of Production publication is planned for 21st March 2018.

2 Executive summary

Provisional results for Quarter 3 (July-September) 2017

Provisional results from the Index of Production (IOP) for the third quarter of 2017 showed that output in Northern Ireland (NI) fell sharply in real terms over the quarter and year (to quarter 3 2017) by 3.6% and 6.5% respectively.

The quarterly and annual decline in NI production output has been driven by the manufacturing sector, with the Food, Beverages and Tobacco sub sector being the primary driver of decline (18.1% fall over the quarter, 38.9% over the year).

In the UK as a whole, production output rose over the quarter (1.1%) and year (1.8%).

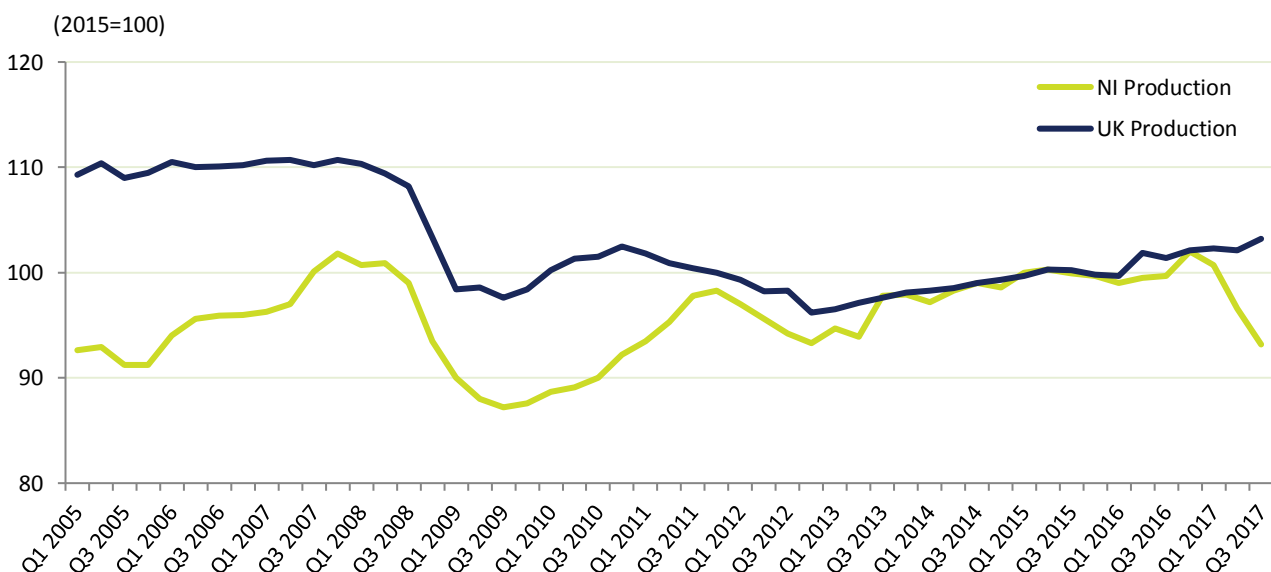
When the most recent four quarters are compared to the previous four quarters, output in the NI production sector decreased by 1.4%, with the whole of the UK reporting growth on this basis (1.7%).

Despite the fall in Quarter 3 2017, the output from the overall production industries (seasonally adjusted) is still 6.9% above the low point recorded in Quarter 3 2009.

Table 1: Index of Production percentage change, Northern Ireland and UK

	NI	UK
Percentage change compared to:		
Previous quarter	-3.6%	1.1%
Same quarter one year ago	-6.5%	1.8%
Most recent four quarters compared to previous four quarters	-1.4%	1.7%

Figure 2: Index of Production, Northern Ireland and UK



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Manufacturing (Seasonally Adjusted)

Manufacturing comprises the main element (81.6%) of the production index and therefore the index has a similar profile to the overall production index.

- Manufacturing output levels fell over the quarter and year by 4.4% and 8.8% respectively
- UK manufacturing levels increased over the quarter and year by 1.1% and 2.8% respectively
- Manufacturing output levels fell by 3.2% over the most recent four quarters compared to the previous four quarters, while UK manufacturing reported growth over the same period (2.2%)
- The manufacturing index remains below (12.9%) the peak in Quarter 4 (October-December) 2007

Manufacturing Productivity (Seasonally Adjusted)

The index of manufacturing productivity (which provides a measure of the number of units of output produced per person per paid hour) fell over the quarter (5.5%) and over the year (10.5%).

Other Production

The water supply, sewerage, and waste management sector (seasonally adjusted) increased marginally over the quarter (0.2%). Compared to a year earlier, this sector rose 2.8%. The NI index is 8.9% below the recent peak recorded in Quarter 1 (January-March) 2012, while the UK index recorded a rise of 18.0% over the same period.

The electricity, gas, steam and air conditioning supply sector (seasonally adjusted) reported an increase in output over the quarter (3.3%) and year (6.2%). The UK recorded an increase over the quarter (1.1%) and no change over the year. The NI index is 2.9% below the peak recorded in Quarter 3 2008, with the UK also reporting a decrease over the same period (8.1%).

The seasonally adjusted mining and quarrying sector (accounting for 2.0% of the overall production index) reported a fall in output of 4.9% compared to the previous quarter and a decrease of 2.2% when compared to the same period a year earlier. The whole of the UK reported growth of 2.1% over the quarter and a fall of 3.5% over the year. The index remains 55.7% above the low point recorded in Quarter 1 2005.

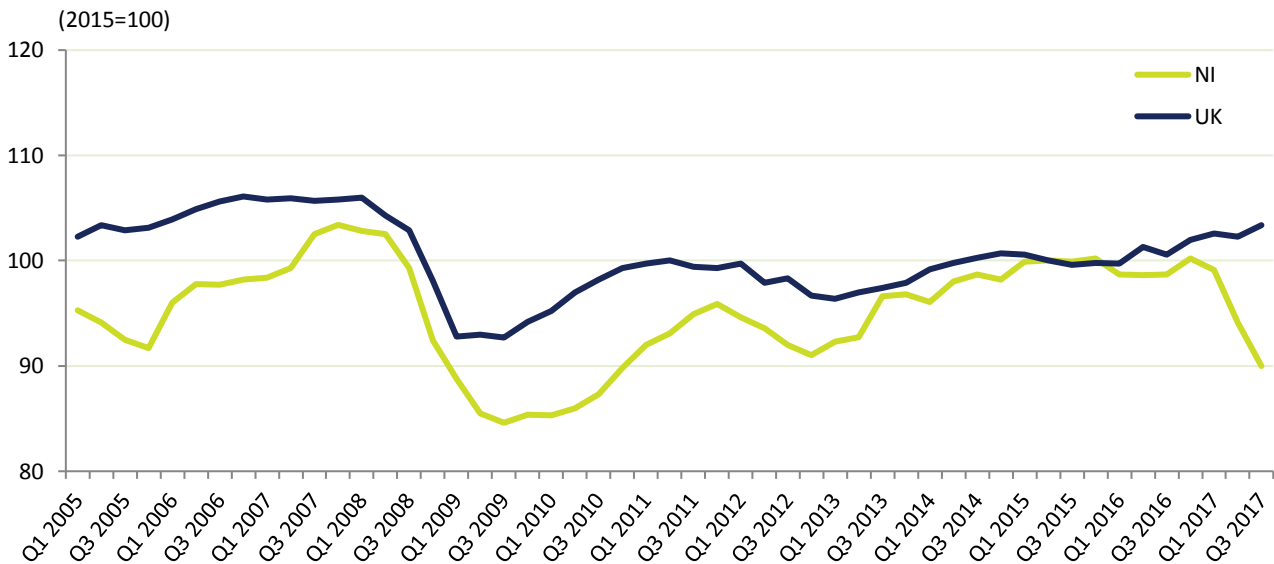
Commentary

The Production sector experienced a sharp contraction (3.6%) over the quarter due to a large fall in the manufacturing sub sector of Food, Beverages and Tobacco. Compared to the same period one year earlier, the NI index fell by 6.5% to Quarter 3 2017. The UK production sector rose over the quarter (1.1%) and year (1.8%).

3 Production by broad industry groups

This section focuses on the performance of the sub-sectors which make up the overall production sector. The main industry categories of which it is comprised are listed in order of importance of the contribution.

Figure 3: Manufacturing¹ – SIC07 Section C (weight = 81.6%), Northern Ireland and UK



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Table 2: Manufacturing percentage change, Northern Ireland and UK

	NI	UK
Percentage change compared to:		
Previous quarter	-4.4%	1.1%
Same quarter one year ago	-8.8%	2.8%
Most recent four quarters compared to previous four quarters	-3.2%	2.2%

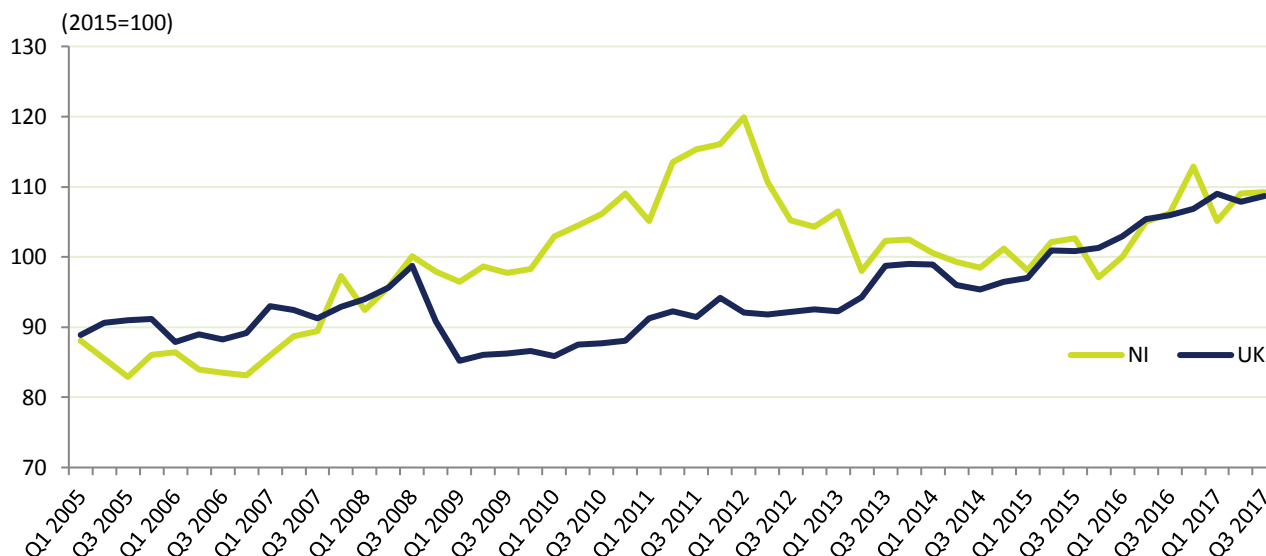
Manufacturing comprises the main element (81.6%) of the production index and has seen output levels fall sharply over the quarter and year by 4.4% and 8.8% respectively, with the Food, Beverages and Tobacco sub sector being the primary driver of decline.

UK manufacturing levels increased over the quarter and year by 1.1% and 2.8% respectively. Manufacturing output levels fell by 3.2% over the most recent four quarters compared to the previous four quarters, while the UK manufacturing increased over the same period (2.2%).

Further detail relating to manufacturing subsectors is given in section 4.

¹ The manufacturing sub-sector has been seasonally adjusted using X-13 ARIMA SEATS.

Figure 4: Water supply, sewerage, and waste management (inc. recycling)² – SIC07 Section E (weight = 9.8%) (seasonally adjusted series), Northern Ireland and UK



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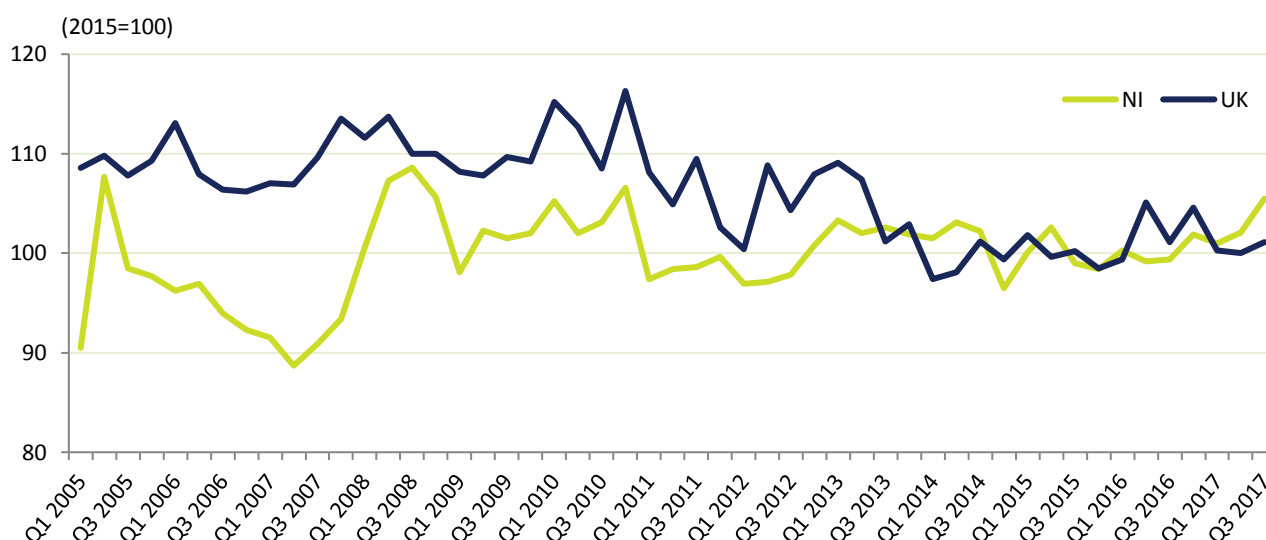
Table 3: Water supply, sewerage, and waste management (inc. recycling) percentage change, Northern Ireland and UK

	NI	UK
Percentage change compared to:		
Previous quarter	0.2%	0.7%
Same quarter one year ago	2.8%	2.6%
Most recent four quarters compared to previous four quarters	6.8%	4.1%

The NI index reported growth over quarter (0.2%) and the year (2.8%). The UK index also reported growth over the quarter (0.7%) and year (2.6%). The NI index is 8.9% below the peak recorded in Quarter 1 2012, while the UK index recorded a rise of 18.0% over the same period.

² The water supply, sewerage and waste management (inc. recycling) sub-sector has been seasonally adjusted using X-13 ARIMA SEATS.

Figure 5: Electricity, gas, steam and air conditioning supply³ – SIC07 Section D (weight = 6.6%), Northern Ireland and UK



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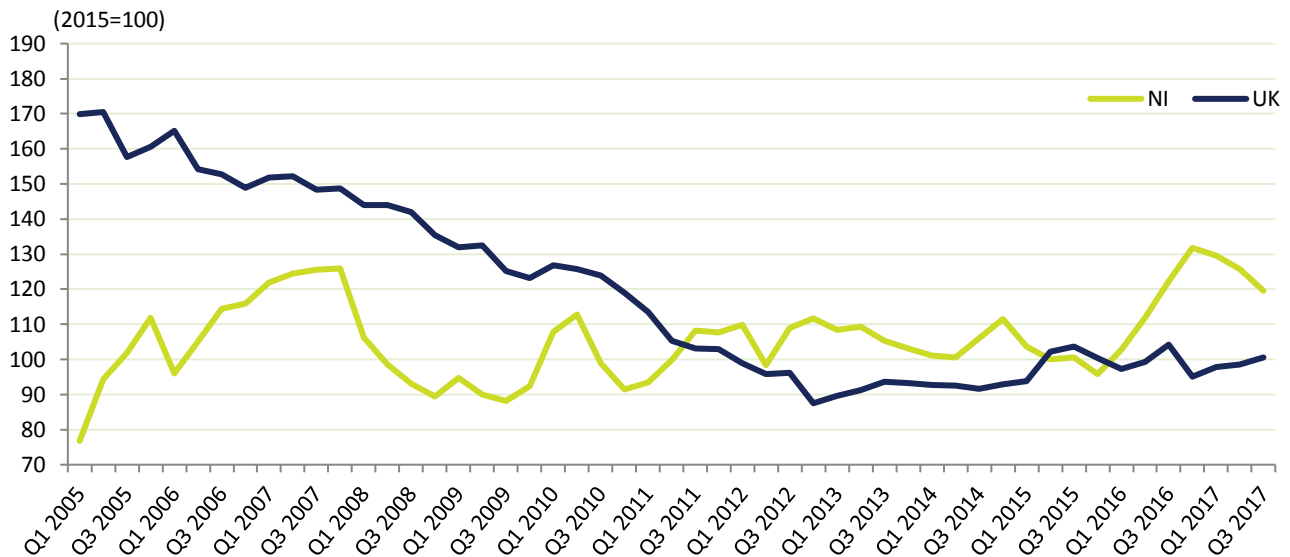
Table 4: Electricity, gas, steam and air conditioning supply, Northern Ireland and UK

	NI	UK
Percentage change compared to:		
Previous quarter	3.3%	1.1%
Same quarter one year ago	6.2%	0.0%
Most recent four quarters compared to previous four quarters	3.3%	0.5%

This index is 2.9% below the peak recorded in Quarter 3 2008, with the UK reporting a larger fall of 8.1% over this same period. The NI index remains 19.0% above the low point recorded in Quarter 2 (April-June) 2007 while the UK has recorded a fall of 5.4% over the same period.

³ The electricity, gas, steam and air conditioning supply sub-sector has been seasonally adjusted using X-13 ARIMA SEATS.

Figure 6: Mining and quarrying⁴ – SIC07 Section B (weight = 2.0%), Northern Ireland and UK



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Table 5: Mining and quarrying percentage change, Northern Ireland and UK

	NI	UK
Percentage change compared to:		
Previous quarter	-4.9%	2.1%
Same quarter one year ago	-2.2%	-3.5%
Most recent four quarters compared to previous four quarters	17.1%	-2.2%

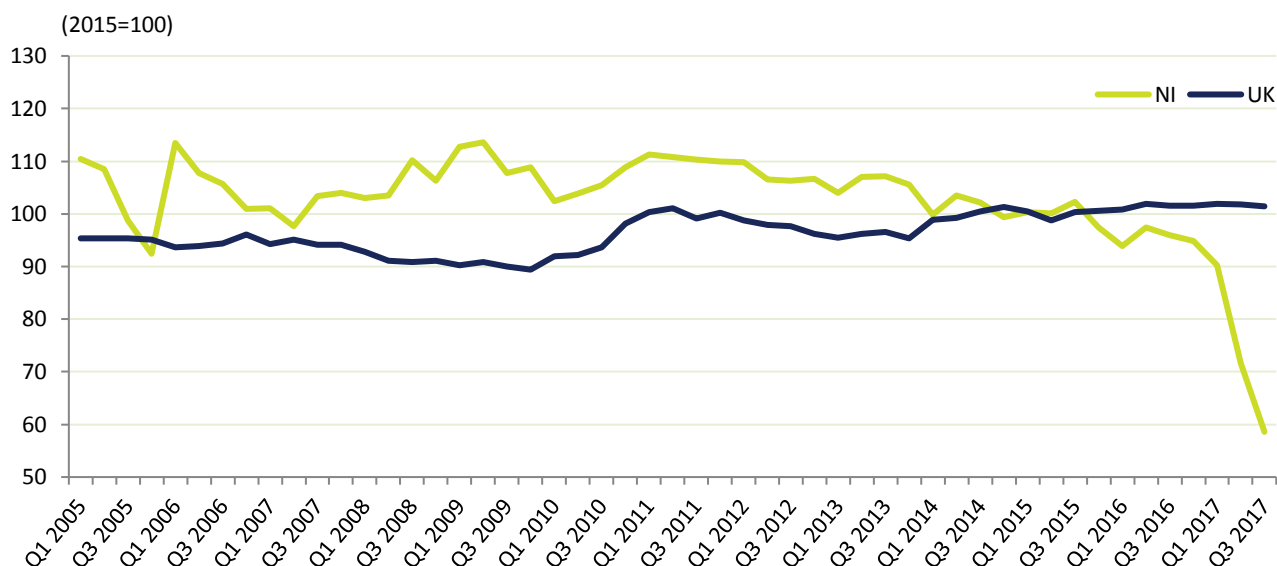
The output from this sector reported a quarterly fall for the third quarter in a row (4.9%), following a high in Quarter 4 2016. However, the index remains 55.7% above the low point recorded in Quarter 1 2005. Since that quarter, UK output has declined 40.8%, although the UK index saw a rise of 2.1% in the last quarter.

⁴ The mining and quarrying sub-sector has been seasonally adjusted using X-13 ARIMA SEATS.

4 Manufacturing subsectors

Manufacturing is the main component of the production sector accounting for some 81.6% of Regional Accounts Gross Value Added (GVA) within the overall production sector. This section focuses on the performance of the sub-sectors of manufacturing. They have been listed in order of importance of the contribution made.

Figure 7: Food products, beverages & tobacco⁵ (weight = 26.5%), Northern Ireland and UK



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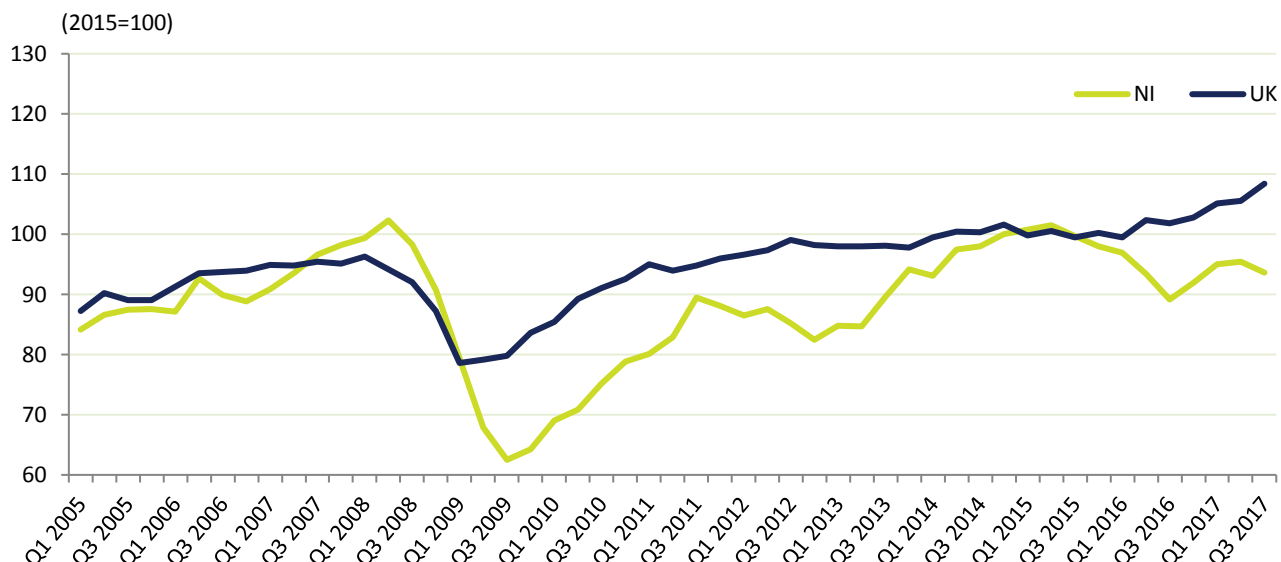
Table 6: Food products, beverages & tobacco percentage change, Northern Ireland and UK

	NI	UK
Percentage change compared to:		
Previous quarter	-18.1%	-0.4%
Same quarter one year ago	-38.9%	-0.2%
Most recent four quarters compared to previous four quarters	-18.0%	0.4%

This sector is reporting a decline in output across all measures of change for Northern Ireland. It has fallen by 18.1% over the quarter, combining with previous falls to be 38.9% down over the year and 48.4% below its peak of Quarter 2 2009. The UK index has seen small decreases over the quarter (0.4%) and year (0.2%).

⁵ The food products, beverages and tobacco manufacturing sub-sector has been seasonally adjusted using X-13 ARIMA SEATS.

Figure 8: Engineering & allied industries⁶ (weight = 21.3%), Northern Ireland and UK



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Table 7: Engineering & allied industries percentage change, Northern Ireland and UK

	NI	UK
Percentage change compared to:		
Previous quarter	-1.9%	2.7%
Same quarter one year ago	4.9%	6.5%
Most recent four quarters compared to previous four quarters	-0.4%	4.5%

After 3 quarters of growth, the index has fallen by 1.9% over the quarter and remains 7.7% below the recent high point recorded in Quarter 2 2015, with the UK reporting an increase of 7.9% over this same period. The NI index has recovered 49.9% from the low point recorded in Quarter 3 2009.

⁶ The engineering and allied industries manufacturing sub-sector has been seasonally adjusted using X-13 ARIMA SEATS.

Figure 9: Total other manufacturing⁷ (weight = 17.4%), Northern Ireland and UK



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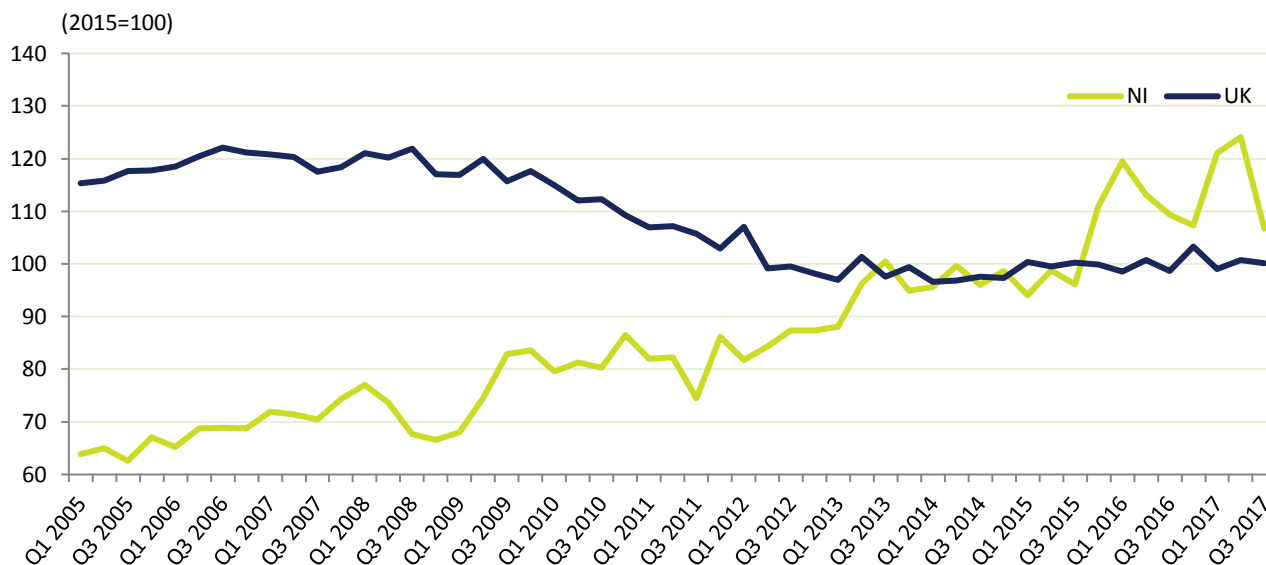
Table 8: Total other manufacturing percentage change, Northern Ireland and UK

	NI	UK
Percentage change compared to:		
Previous quarter	0.2%	1.4%
Same quarter one year ago	-0.6%	1.0%
Most recent four quarters compared to previous four quarters	2.9%	1.3%

This sector recorded a quarterly increase in output for NI and UK, of 0.2% and 1.4% respectively. The NI index remains 15.3% below the peak of Quarter 1 2007, with the UK as a whole reporting a smaller contraction over the same period (4.6%).

⁷ The total other manufacturing sub-sector has been seasonally adjusted using X-13 ARIMA SEATS.

Figure 10: Manufacturing of chemical and pharmaceutical products⁸ (weight = 7.5%), Northern Ireland and UK



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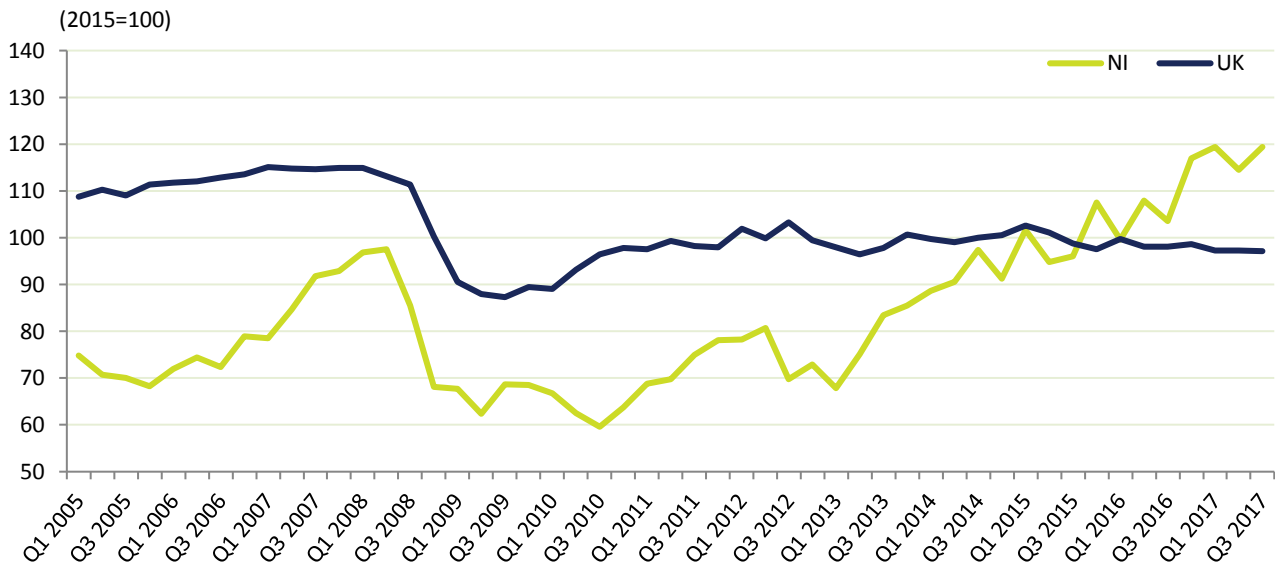
Table 9: Manufacturing of chemical and pharmaceutical products percentage change, Northern Ireland and UK

	NI	UK
Percentage change compared to:		
Previous quarter	-14.1%	-0.6%
Same quarter one year ago	-2.5%	1.4%
Most recent four quarters compared to previous four quarters	1.3%	1.3%

After 2 quarters of growth leading to a series high in Quarter 2 2017, this sector reported a quarterly decrease of 14.1%, leaving the index 2.5% lower than a year ago. However, the manufacturing of chemical and pharmaceutical products sector remains 70.4% above the pre-recession low recorded in Quarter 3 2005.

⁸ The manufacturing of chemical and pharmaceutical products manufacturing sub-sector has not been seasonally adjusted.

Figure 11: Basic and fabricated metal products⁹ (weight = 6.4%), Northern Ireland and UK



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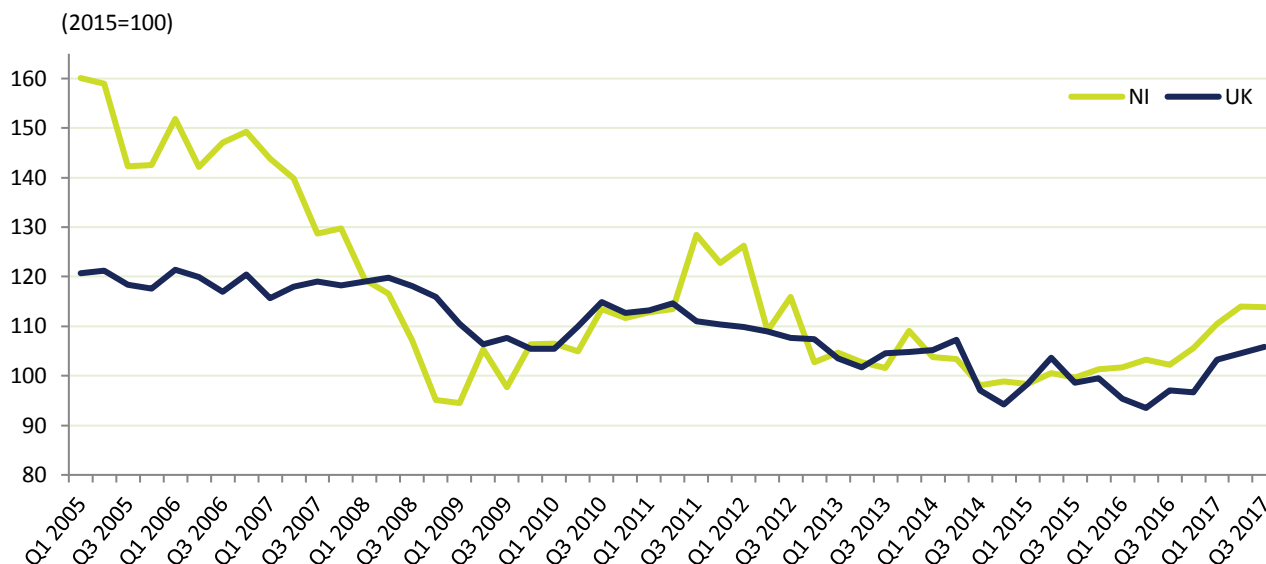
Table 10: Basic and fabricated metal products percentage change, Northern Ireland and UK

	NI	UK
Percentage change compared to:		
Previous quarter	4.2%	-0.2%
Same quarter one year ago	15.3%	-1.0%
Most recent four quarters compared to previous four quarters	12.3%	-0.8%

This index has returned to the peak level recorded in Quarter 1 2017. Over the year output rose 15.3%, while in the UK as a whole there was a marginal quarterly decrease (0.2%) and a small annual fall (1.0%). NI Output is over double that seen at the low point of Quarter 3 2010 (a rise of 100.4%)

⁹ The basic and fabricated metal products manufacturing sub-sector has been seasonally adjusted using X-13 ARIMA SEATS.

Figure 12: Textiles, leather & related products¹⁰ (weight = 2.5%), Northern Ireland and UK



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Table 11: Textiles, leather & related products percentage change, Northern Ireland and UK

	NI	UK
Percentage change compared to:		
Previous quarter	-0.2%	1.2%
Same quarter one year ago	11.3%	9.1%
Most recent four quarters compared to previous four quarters	8.7%	6.4%

The index remains below (28.9%) the peak in Quarter 1 2005; however, the index has recovered by 20.5% from the minimum level recorded in Quarter 1 2009.

¹⁰ The textiles, leather and related products manufacturing sub-sector has been seasonally adjusted using X-13 ARIMA SEATS. Page 17

5 Market sector analysis

Market sector analysis classifies production under one of three headings which are derived from the main SIC classification groups.

Investment goods – also known as capital goods – are the plant, equipment and inventories used to produce goods for consumption. Companies will invest further in these kinds of goods when they are looking to expand their production or upgrade existing equipment.

Intermediate goods are those purchased by the industry as inputs into the final production of goods. This category would include the materials (such as cement, rubber, plastic, chemicals and electronics) which will ultimately be used to produce a good for consumption.

Consumer goods are the final goods produced by industry which are intended for purchase by private consumers. These goods are consumed by the mass market rather than used in the production of another good and are therefore closely linked to consumer demand and the factors which influence this.

It should be noted that these groups are for illustrative purposes as there can be overlap where manufacturer goods could be used as capital to produce another good but will also be used for consumption (e.g. motor vehicles).

Table 12: Index of Production by Market Sector Goods¹¹ (annual data)

	Consumer Goods (39.8%¹²)	Intermediate Goods (39.4%¹²)	Investment Goods (20.8%¹²)
	Seasonally Adjusted	Seasonally Adjusted	Seasonally Adjusted
2005	102	102	79
2006	106	104	82
2007	101	109	87
2008	105	110	87
2009	110	94	63
2010	105	98	67
2011	111	100	78
2012	107	98	79
2013	105	99	85
2014	101	99	94
2015	100	100	100
2016	96	102	97

¹¹ The market sector goods have been seasonally adjusted using X-13 ARIMA SEATS.

¹² The regional GVA weights relate to 2015.

Figure 13: Market Sector Goods, Northern Ireland

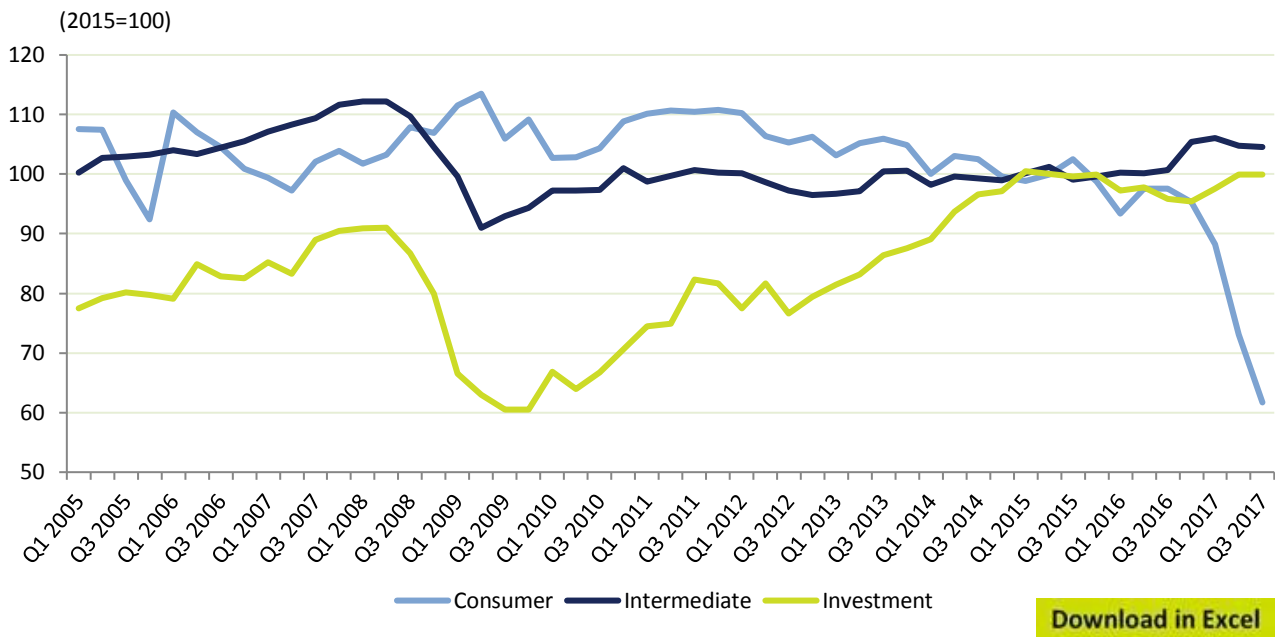


Table 13: Index of Production by Market Sector Goods percentage change, Northern Ireland

	Consumer Goods	Intermediate Goods	Investment Goods
Percentage change compared to:			
Previous quarter	-15.6%	-0.2%	0.0%
Same quarter one year ago	-36.8%	3.9%	4.3%
Most recent four quarters compared to previous four quarters	-17.8%	5.0%	0.5%

Consumer Goods (Seasonally Adjusted) (weight 39.8%)

The consumer goods category has experienced general decline since the peak in Quarter 2 2009, where the index has decreased by 45.6% since that point. This quarter's decline, again led by a decrease in the Manufacture of Food, Beverages and Tobacco, was the fourth consecutive quarterly fall.

Intermediate Goods (Seasonally Adjusted) (weight 39.4%)

This category reported a marginal fall (0.2%) this quarter, and remains at a similar level to the end of 2016. The index remains 14.9% above the minimum level recorded in Quarter 2 2009.

Investment Goods (Seasonally Adjusted) (weight 20.8%)

The significant falls in output experienced from 2008 where the index fell between Quarter 2 2008 and Quarter 3 2009 reflects the impact of the global recession on businesses, with many companies looking to survive as the economy contracted. In Quarter 3 2017, investment goods reported no change in output over the quarter, but growth over the year (4.3%). This category has shown significant recovery of 65.3% from the low point recorded in Quarter 3 2009.

6 Seasonally adjusted index of manufacturing productivity¹³

The seasonally adjusted index of manufacturing productivity provides a measure of the number of units of output produced per person per paid hour. The index includes seasonally adjusted employees in employment, the seasonally adjusted manufacturing index and average weekly hours (based on hours worked for full-time adult manufacturing workers including overtime from the Annual Survey of Hours and Earnings).

The index of manufacturing productivity recorded a decrease of 5.5% over the quarter and a fall of 10.5% over the year. The index also reported a decline of 4.8% over the latest four quarters compared to the previous four quarters.

Figure 14: Manufacturing output & productivity, Northern Ireland



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The most recently published Quarterly Employment Survey seasonally adjusted figures for September 2017 (based on the 2007 Standard Industrial Classification) reported a rise of 1.2% over the quarter in employee jobs in the manufacturing sector and of 1.9% over the year.

Table 14: Seasonally adjusted index of manufacturing productivity, Northern Ireland

Annual Average		Annual Average	
2005	87	2012	101
2006	90	2013	102
2007	96	2014	102
2008	98	2015	100
2009	92	2016	96
2010	96		
2011	103		

¹³ The index of manufacturing productivity has been seasonally adjusted using X-13 ARIMA SEATS.

Table 15: Seasonally adjusted index of manufacturing productivity percentage change, Northern Ireland

	NI
Percentage change compared to:	
Previous quarter	-5.5%
Same quarter one year ago	-10.5%
Most recent four quarters compared to previous four quarters	-4.8%

7 Quarterly/annual/rolling annual average changes

Table 16: Index of Production – Quarterly, annual and rolling annual average¹⁴ changes by sector, Northern Ireland

		All Production industries - Sections B, C, D, E (seasonally adjusted)			Manufacturing – Section C (seasonally adjusted) weight ¹⁵ = 81.6%			Water, supply & waste management – Section E (seasonally adjusted) weight ¹⁵ = 9.8%			Electricity, gas, steam & air conditioning – Section D (seasonally adjusted) weight ¹⁵ = 6.6%			Mining & quarrying – Section B (seasonally adjusted) weight ¹⁵ = 2.0%							
		Index	% Change			Index	% Change			Index	% Change			Index	% Change						
			Quarter	Annual	Rolling		Quarter	Annual	Rolling		Quarter	Annual	Rolling		Quarter	Annual	Rolling	Quarter	Annual	Rolling	
2005	Q1	92.6	-	-	-	95.3	-	-	-	88.1	-	-	-	90.5	-	-	-	76.8	-	-	-
	Q2	92.9	0.3	-	-	94.1	-1.3	-	-	85.5	-2.9	-	-	107.7	19.0	-	-	94.4	22.9	-	-
	Q3	91.2	-1.8	-	-	92.5	-1.7	-	-	82.9	-3.1	-	-	98.5	-8.6	-	-	101.9	8.0	-	-
	Q4	91.2	0.0	-	-	91.7	-0.9	-	-	86.1	3.9	-	-	97.7	-0.8	-	-	111.9	9.8	-	-
2006	Q1	94.0	3.1	1.5	-	96.0	4.7	0.7	-	86.4	0.4	-1.9	-	96.2	-1.6	6.2	-	96.0	-14.3	24.9	-
	Q2	95.6	1.7	3.0	-	97.8	1.8	3.9	-	84.0	-2.8	-1.7	-	96.9	0.8	-10.0	-	105.2	9.6	11.5	-
	Q3	95.9	0.3	5.2	-	97.7	0.0	5.7	-	83.5	-0.7	0.7	-	94.0	-3.0	-4.5	-	114.5	8.9	12.4	-
	Q4	96.0	0.1	5.3	3.7	98.2	0.5	7.1	4.3	83.1	-0.4	-3.4	-1.6	92.3	-1.9	-5.6	-3.8	115.8	1.1	3.4	12.1
2007	Q1	96.3	0.3	2.4	4.0	98.4	0.2	2.4	4.8	86.0	3.5	-0.5	-1.2	91.5	-0.8	-4.8	-6.3	121.9	5.3	27.1	13.2
	Q2	97.0	0.7	1.4	3.5	99.3	1.0	1.6	4.1	88.7	3.1	5.5	0.6	88.7	-3.1	-8.5	-5.8	124.5	2.1	18.3	14.9
	Q3	100.1	3.2	4.4	3.3	102.5	3.2	4.9	4.0	89.4	0.8	7.1	2.1	90.9	2.5	-3.4	-5.6	125.5	0.8	9.6	14.0
	Q4	101.8	1.7	6.0	3.6	103.4	0.8	5.3	3.5	97.3	8.9	17.1	7.2	93.4	2.7	1.2	-3.9	125.9	0.3	8.8	15.4
2008	Q1	100.7	-1.1	4.6	4.1	102.8	-0.5	4.5	4.1	92.4	-5.1	7.4	9.2	100.6	7.7	9.9	-0.3	106.3	-15.5	-12.8	5.4
	Q2	100.9	0.2	4.1	4.8	102.5	-0.3	3.2	4.5	95.7	3.6	7.9	9.8	107.3	6.6	21.0	7.0	98.6	-7.2	-20.7	-4.3
	Q3	99.0	-1.9	-1.1	3.4	99.3	-3.2	-3.2	2.4	100.1	4.6	12.0	11.0	108.6	1.2	19.5	12.8	93.1	-5.6	-25.8	-13.0
	Q4	93.5	-5.5	-8.1	-0.2	92.4	-7.0	-10.6	-1.6	97.9	-2.3	0.5	6.8	105.6	-2.8	13.0	15.8	89.4	-4.0	-29.0	-22.1

¹⁴ The change in the rolling annual average measures the change in the average of the latest four quarters against the same four quarters one year previous.

¹⁵ The regional GVA weights relate to 2015.

Table 16 (cont): Index of Production – Quarterly, annual and rolling annual average¹⁶ changes by sector, Northern Ireland

		All Production industries - Sections B, C, D, E (seasonally adjusted)				Manufacturing – Section C (seasonally adjusted) weight ¹⁷ = 81.6%				Water, supply & waste management – Section E (seasonally adjusted) weight ¹⁷ = 9.8%				Electricity, gas, steam & air conditioning – Section D (seasonally adjusted) weight ¹⁷ = 6.6%				Mining & quarrying – Section B (seasonally adjusted) weight ¹⁷ = 2.0%			
		Index	% Change			Index	% Change			Index	% Change			Index	% Change			Index	% Change		
			Quarter	Annual	Rolling		Quarter	Annual	Rolling		Quarter	Annual	Rolling		Quarter	Annual	Rolling		Quarter	Annual	Rolling
2009	Q1	90.0	-3.8	-10.7	-4.0	88.8	-3.8	-13.6	-6.1	96.5	-1.4	4.5	6.1	98.1	-7.1	-2.5	12.3	94.7	5.8	-11.0	-22.0
	Q2	88.0	-2.2	-12.9	-8.2	85.5	-3.8	-16.6	-11.0	98.6	2.1	3.0	4.9	102.3	4.2	-4.7	5.7	90.0	-4.9	-8.7	-19.5
	Q3	87.2	-0.9	-11.9	-10.9	84.6	-1.1	-14.8	-13.9	97.7	-0.8	-2.4	1.3	101.5	-0.7	-6.6	-0.6	88.1	-2.1	-5.4	-14.6
	Q4	87.6	0.5	-6.3	-10.5	85.4	1.0	-7.5	-13.3	98.3	0.6	0.5	1.3	102.0	0.5	-3.4	-4.3	92.4	4.9	3.3	-5.8
2010	Q1	88.7	1.3	-1.4	-8.3	85.3	-0.2	-4.0	-11.0	102.9	4.6	6.6	1.9	105.2	3.2	7.2	-2.1	107.9	16.8	14.0	0.7
	Q2	89.1	0.4	1.3	-4.8	86.0	0.8	0.5	-6.7	104.5	1.6	6.0	2.6	102.0	-3.0	-0.2	-0.9	112.8	4.5	25.2	9.2
	Q3	90.0	0.9	3.2	-0.9	87.3	1.5	3.2	-2.1	106.1	1.6	8.6	5.4	103.1	1.0	1.6	1.2	98.9	-12.3	12.2	13.7
	Q4	92.2	2.5	5.3	2.1	89.8	2.9	5.1	1.2	109.0	2.7	10.8	8.0	106.6	3.4	4.5	3.2	91.5	-7.4	-1.0	12.5
2011	Q1	93.5	1.3	5.4	3.8	92.0	2.4	7.8	4.2	105.1	-3.6	2.1	6.8	97.4	-8.6	-7.4	-0.4	93.4	2.1	-13.5	4.8
	Q2	95.3	2.0	7.0	5.2	93.1	1.2	8.2	6.1	113.5	8.0	8.7	7.5	98.4	1.0	-3.5	-1.3	99.8	6.9	-11.5	-4.4
	Q3	97.8	2.6	8.7	6.6	94.9	2.0	8.8	7.5	115.3	1.6	8.7	7.6	98.6	0.2	-4.3	-2.7	108.3	8.5	9.6	-4.6
	Q4	98.3	0.5	6.6	6.9	95.9	1.0	6.7	7.9	116.1	0.7	6.5	6.5	99.6	0.9	-6.6	-5.5	107.6	-0.7	17.6	-0.5
2012	Q1	97.0	-1.3	3.8	6.5	94.6	-1.4	2.8	6.6	119.9	3.2	14.1	9.5	96.9	-2.7	-0.6	-3.8	109.8	2.1	17.6	7.3
	Q2	95.6	-1.5	0.3	4.8	93.6	-1.0	0.6	4.6	110.7	-7.6	-2.5	6.5	97.1	0.2	-1.3	-3.3	98.3	-10.5	-1.5	10.6
	Q3	94.2	-1.5	-3.7	1.7	92.0	-1.7	-3.1	1.7	105.2	-4.9	-8.7	2.0	97.8	0.7	-0.9	-2.4	109.0	10.9	0.6	8.1
	Q4	93.3	-0.9	-5.0	-1.2	91.0	-1.1	-5.1	-1.3	104.3	-0.9	-10.2	-2.2	100.8	3.1	1.2	-0.4	111.7	2.5	3.9	4.8
2013	Q1	94.7	1.5	-2.4	-2.7	92.3	1.4	-2.4	-2.5	106.5	2.1	-11.1	-8.2	103.3	2.5	6.6	1.4	108.4	-3.0	-1.3	0.4
	Q2	93.9	-0.9	-1.8	-3.2	92.7	0.5	-1.0	-2.9	98.0	-8.0	-11.5	-10.4	102.0	-1.3	5.0	3.0	109.3	0.9	11.1	3.4
	Q3	97.8	4.1	3.8	-1.4	96.6	4.2	5.0	-0.9	102.3	4.4	-2.8	-9.0	102.6	0.7	5.0	4.4	105.3	-3.7	-3.4	2.3
	Q4	97.9	0.1	4.9	1.1	96.8	0.2	6.4	1.9	102.5	0.2	-1.8	-7.0	101.9	-0.8	1.1	4.4	103.2	-2.0	-7.7	-0.7

¹⁶ The change in the rolling annual average measures the change in the average of the latest four quarters against the same four quarters one year previous.

¹⁷ The regional GVA weights relate to 2015.

Table 16 (cont): Index of Production – Quarterly, annual and rolling annual average¹⁸ changes by sector, Northern Ireland

		All Production industries - Sections B, C, D, E (seasonally adjusted)				Manufacturing – Section C (seasonally adjusted) weight ¹⁹ = 81.6%				Water, supply & waste management – Section E (seasonally adjusted) weight ¹⁹ = 9.8%				Electricity, gas, steam & air conditioning – Section D (seasonally adjusted) weight ¹⁹ = 6.6%				Mining & quarrying – Section B (seasonally adjusted) weight ¹⁹ = 2.0%			
		Index	% Change			Index	% Change			Index	% Change			Index	% Change			Index	% Change		
			Quarter	Annual	Rolling		Quarter	Annual	Rolling		Quarter	Annual	Rolling		Quarter	Annual	Rolling		Quarter	Annual	Rolling
2014	Q1	97.2	-0.7	2.6	2.3	96.1	-0.7	4.2	3.6	100.6	-1.8	-5.5	-5.5	101.5	-0.3	-1.7	2.3	101.1	-2.0	-6.7	-2.0
	Q2	98.3	1.1	4.7	4.0	98.0	1.9	5.7	5.3	99.3	-1.3	1.4	-2.3	103.1	1.6	1.1	1.3	100.5	-0.6	-8.0	-6.5
	Q3	99.0	0.7	1.3	3.3	98.7	0.8	2.2	4.6	98.5	-0.8	-3.7	-2.5	102.2	-0.9	-0.4	0.0	106.0	5.5	0.7	-5.5
	Q4	98.6	-0.4	0.8	2.3	98.2	-0.6	1.4	3.3	101.2	2.7	-1.3	-2.3	96.5	-5.6	-5.2	-1.6	111.5	5.2	8.1	-1.6
2015	Q1	100.0	1.4	2.9	2.4	99.9	1.8	3.9	3.3	98.1	-3.1	-2.6	-1.6	100.1	3.7	-1.4	-1.5	103.7	-7.0	2.6	0.7
	Q2	100.3	0.3	2.0	1.8	100.0	0.1	2.1	2.4	102.1	4.1	2.7	-1.2	102.6	2.5	-0.5	-1.9	100.0	-3.5	-0.5	2.7
	Q3	99.9	-0.4	0.9	1.7	99.9	-0.2	1.1	2.1	102.7	0.7	4.3	0.8	99.0	-3.5	-3.2	-2.6	100.5	0.4	-5.2	1.2
	Q4	99.7	-0.2	1.1	1.7	100.2	0.3	2.1	2.3	97.1	-5.5	-4.0	0.1	98.4	-0.6	1.9	-0.8	95.8	-4.6	-14.1	-4.6
2016	Q1	99.0	-0.8	-1.1	0.7	98.7	-1.5	-1.2	1.0	100.0	2.9	1.9	1.2	100.3	1.9	0.2	-0.4	102.7	7.2	-0.9	-5.4
	Q2	99.5	0.6	-0.8	0.0	98.6	-0.1	-1.4	0.1	105.0	5.0	2.9	1.3	99.2	-1.0	-3.3	-1.1	111.8	8.8	11.8	-2.5
	Q3	99.7	0.2	-0.2	-0.2	98.7	0.1	-1.2	-0.4	106.2	1.1	3.4	1.0	99.4	0.1	0.4	-0.2	122.3	9.4	21.7	4.1
	Q4	102.0	2.4	2.3	0.1	100.2	1.5	0.0	-1.0	112.9	6.3	16.2	6.0	101.9	2.5	3.5	0.2	131.8	7.8	37.6	17.2
2017	Q1	100.7	-1.3	1.7	0.8	99.1	-1.1	0.4	-0.6	105.1	-6.9	5.1	6.8	101.0	-0.8	0.8	0.3	129.5	-1.7	26.1	24.1
	Q2	96.6	-4.0	-2.9	0.2	94.1	-5.1	-4.6	-1.3	109.0	3.7	3.8	7.0	102.1	1.1	2.9	1.9	125.7	-3.0	12.4	24.0
	Q3	93.2	-3.6	-6.5	-1.4	90.0	-4.4	-8.8	-3.2	109.2	0.2	2.8	6.8	105.5	3.3	6.2	3.3	119.6	-4.9	-2.2	17.1

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¹⁸ The change in the rolling annual average measures the change in the average of the latest four quarters against the same four quarters one year previous.

¹⁹ The regional GVA weights relate to 2015.

8 Background notes

Background

The Northern Ireland Index of Production (IOP) has been produced since 1949 and figures are available in the current format back to 2005. It is published quarterly and is designed to provide a general measure of changes in the output of the production industries in Northern Ireland. (This is defined as Standard Industrial Classification 2007 sections B, C, D and E.) In 2015 these industries accounted for approximately 18% of regional Gross Value Added (GVA). More information on Regional GVA is available at <http://www.ons.gov.uk/economy/grossvalueaddedgva>

Index numbers

An index number is a convenient form of expressing a series in a way that makes it easier to see changes in that series. The numbers in the series are expressed relatively, with one number in that series chosen to be the 'base' (usually expressed as 100) and other numbers being measured relative to that base. Index numbers have the advantage that they allow different types of data to be combined on a consistent basis, e.g. deflated current price data with volume data. The aim of the Index of Production is to provide a reliable indicator of short-term changes in the output of the production sector. Index numbers are a very good way of communicating this message. For example, the Index of Production Quarter 3 2017 value of 93.2, means that the level of output was 6.8% lower than in 2015 which had a base year value of 100. The NI IOP is a Laspeyres volume index. The UK economic accounts are based on the European System of Accounts (ESA), which in turn is based on the UN System of Accounts (SNA). The ESA-preferred type of output indicator is one that measures deflated gross output (or turnover) for an industry. These use an approximate price change estimator to remove the effects of inflation. For this reason, we and the ONS, use a Laspeyres volume index (as opposed to Paasche, Lowe or Fisher indices). The ONS paper, link following, on the Methodology of the Monthly Index of Services (Annex A: Mathematical Formulation of the Index of Services) gives a good explanation of Index numbers theory. <http://www.ons.gov.uk/ons/guide-method/user-guidance/index-of-services/index-of-services-annex-a--mathematical-formulation-of-the-index.pdf>

Index sample

The IOP sample was refreshed for Quarter 1 2014 and was drawn on a SIC07 basis. The sample was boosted from around 650 businesses and it is now approximately 1,000 companies. Due, in part, to the significant number of companies which fall into the census element, more than 60% of businesses in the new sample were also in the old sample. As a statutory survey the response rate is 80% (on average). The sample of production industries is selected directly from the Inter Departmental Business Register (IDBR), by stratifying companies by industry and company size. The sample consists of a census of dominant companies and a Neyman stratified random sample of the remaining companies. The census element consists of all companies employing 40 or more employees and those employing 0 to 39 employees and having a turnover of £10 million or more. This sample

has been designed to give sufficiently accurate results, yet keep the total costs to businesses to a minimum.

Questionnaires were issued to both the new and existing businesses on each sample, for three quarters, as a means to calculate a link factor between the old sample (up to and including Quarter 4 2013) and the new sample (from Quarter 1 2014 onwards). With advice from Office for National Statistics methodologists, as the result of a successful Quality Improvement Fund, a methodology has been developed in order to integrate the new samples without making significant changes to the back series data, thus giving a meaningful index.

Data collection, validation and Index calculation

Survey forms are issued quarterly, immediately after the period to which they relate. For example, forms are issued in April asking for information relating to January to March. Since the beginning of 2016, a Quarterly Business Survey form was issued to all businesses who previously received an Index of Production form and/or a Quarterly Employment Survey form and companies are now asked to provide employment and/or turnover information at the same time. This combined survey form, coupled with the roll-out of an 'eForm' (designed to collect data electronically) is intended to reduce the burden to businesses currently receiving two separate forms at different times.

Historically a number of companies provided volume information rather than turnover data (e.g. litres of a product rather than the turnover value of the product). From Quarter 2, 2010 these companies were asked to also provide turnover data and from Quarter 2 2011 the IOP estimates have solely been based on turnover. In response to user demand information is also collected on the value of exports. This will be used to produce a quarterly index in due course once a sufficient back series has been established and development work has been undertaken.

Data validation is carried out ensuring that data falls within the expected limits, contacting the company where appropriate for clarification.

The overall Index of Production is calculated by weighting together industry level indices using relative shares of Accounts Gross Value Added (GVA) data from the most recent Regional Accounts, which is currently 2015.

The IOP relative weights used to produce the aggregated industries are derived from the Regional GVA estimate, published annually by ONS. Figures within this publication are weighted using 2015 GVA which became available on 15th December 2016.

For practically all series, the value of sales deflated to allow for price changes, is used as the indicator. In the remaining cases, changes in the volume of production or the number of employees are used as a proxy measure.

From Quarter 2 2014, the individual series have been seasonally adjusted using X-13 ARIMA SEATS, which introduces improvements to the models used for seasonal adjustment. Also, during the seasonal adjustment review in December 2015 (from Quarter 3 2015) the smoothing methodology, applied to companies with particularly volatile returns, has now been removed for the remaining few companies. The main sectors

affected are the water supply, sewerage, and waste management (inc. recycling) and mining and quarrying along with some of the individual manufacturing subsectors.

Further information on the methodology and impact of the seasonal adjustment changes can be found in the methodological note published at

<https://www.nisra.gov.uk/publications/methodology-and-usage-iop>

It is also possible to aggregate all individual series to give indices by final use of goods produced. This is known as a market sector analysis and estimates are given in Section 5 of this bulletin. It distinguishes between seasonally adjusted consumer, seasonally adjusted investment and seasonally adjusted intermediate goods. The latter are described as intermediate because they include materials used to produce goods for consumption.

The productivity index provides a measure of the number of units of output produced per person per paid hour. The productivity index is based on the seasonally adjusted manufacturing index, seasonally adjusted employees in employment and average weekly hours (based on hours worked for full-time adult manufacturing workers including overtime from the Annual Survey of Hours and Earnings). An index of total employee hours is calculated based on the number of employees in employment and average weekly hours. The seasonally adjusted index of manufacturing is divided by the index of total employee hours to produce the Index of Productivity.

The seasonally adjusted Northern Ireland Index of Production is annually chain-linked (chain-linking involves the linking of growth estimates between different periods in order to produce a continuous time series) using GVA estimates derived from regional accounts using the fourth quarter of the preceding year as the link period. Inaccuracies caused by the assumption of a stable relationship between GVA and turnover are reduced using this methodology. When annual weights are used the assumption only has to be maintained from one year to the next year. A paper on annual chain-linking from ONS is available at <http://www.ons.gov.uk/ons/rel/elmr/economic-trends--discontinued--no--630--may-2006/methodological-note--annual-chain-linking.pdf>

The standard method for linking two series (for example one based on a SIC03 sample and one based on SIC07 sample) is to calculate the index under the old and new circumstances over some link period, and then apply the growth of the subsequent new series to the old series. As the relationship of both samples to the IDBR was known, the IDBR was used to provide the link period. Thus the ratio of the IDBR turnover for Quarter 1 2011 and Quarter 2 2011 is known. We have the Quarter 2 2011 value (SIC07) and the Quarter 1 2011 value (converted from SIC03 to SIC07). We can, therefore, create the following link factor:

$$\text{link factor} = \frac{(\text{Q2 2011 sample estimate} * \text{IDBR Q1 2011 value})}{(\text{Q1 2011 sample estimate} * \text{IDBR Q2 2011 value})}$$

This can then be applied to the converted back series along with historic Quarter 1 to Quarter 2 fluctuations, thus retaining the previous growth rates and any seasonal effects.

For Quarter 1 2014 and Quarter 2 2014, questionnaires were issued to companies in both the existing sample and the new sample, thus allowing a link factor to be calculated based on the average percentage change between the two. This link factor was then applied to

each of the quarterly turnover back series (grossed & deflated), in order to give a series of the same magnitude as the new sample series (from Quarter 1 2014 onwards).

Deflation

All series, unless otherwise quoted, are measured at constant market price. Deflators adjust the value series to take out the effect of price change to give the volume series. Details on the changes to the ONS deflator methodology can be found at the following link <http://www.ons.gov.uk/ons/guide-method/method-quality/specific/economy/national-accounts/articles/deflation-improvements-in-the-uk-national-accounts.pdf>

Seasonal adjustment

The index numbers in this statistical bulletin are seasonally adjusted, following the annual seasonal adjustment review which was carried out in December 2015. This aids interpretation by removing annually recurring fluctuations, for example due to holidays or other regular seasonal patterns. All IOP time series are checked on an annual basis using X-13 ARIMA SEATS for evidence of seasonality, and those series where seasonality is detected are adjusted using X-13 ARIMA SEATS in order to obtain a clear picture of the general trend. Unadjusted data are also available.

The figures presented in this publication are calculated using the X-13 ARIMA SEATS method of seasonal adjustment. The following is a link to an ONS Guide to seasonal adjustment with X-12 ARIMA (an updated guide for X-13 ARIMA SEATS is currently being finalised by ONS) <http://www.ons.gov.uk/ons/guide-method/method-quality/general-methodology/time-series-analysis/guide-to-seasonal-adjustment.pdf>

Quality reporting/Planned future revisions

One indicator of the reliability of the figures in this bulletin can be obtained by monitoring the size of revisions. The IOP revisions policy can be found at <https://www.nisra.gov.uk/publications/quality-and-revisions-documents-iop>

Summary quality report

The latest summary quality report for this publication can be found on the IOP Quality and Revisions page of the website at <https://www.nisra.gov.uk/publications/quality-and-revisions-documents-iop>

Publication of results on a SIC07 basis

A Standard Industrial Classification (SIC) was first introduced into the UK in 1948 for use in classifying business establishments by the type of economic activity in which they are engaged. The UK is required by European legislation to revise the SIC in parallel with NACE (the statistical classification of economic activities in the European Communities) so that both systems are identical down to and including the four digit class level. More information on SIC07 can be found at the following links:

<http://www.ons.gov.uk/ons/guide-method/classifications/current-standard-classifications/standard-industrial-classification/index.html>

<http://www.ons.gov.uk/rel/naa2/second-estimate-of-gdp/q2-2011/art---bb11-improvements-to-gdp--ios--iop.html>

Status of figures in current bulletin

Results are published on a SIC07 basis and in line with ONS, the base year of the Northern Ireland Index of Production (IOP) has been moved to 2015.

All figures are published to one decimal place. Figures for annual averages and percentage changes over the previous quarter and year are based on unrounded figures and may not agree with the published constituent parts.

Results, particularly for the latest quarter, are provisional and subject to revision as more up to date information become available.

The overall IOP index has been produced using X-13 ARIMA SEATS seasonal adjustment. Some of the sectors and sub-sectors have also been seasonally adjusted, and those can be identified throughout the bulletin.

Comparisons between the Index of Production and the Annual Business Inquiry (ABI) may not necessarily match because of definitional and coverage differences.

Publications policy

All Economic and Labour Market Statistics (ELMS) Branch statistical publications are available to download free of charge from the NISRA website

<https://www.nisra.gov.uk/statistics>. Further information on ELMS is available at <https://www.nisra.gov.uk/statistics/economy/nisra-economic-and-labour-market-statistics-elms>

The IOP bulletin and tables from the current publication, which includes all the data from the start of the series in 2005, are available in Excel and Open Document format to download free of charge from the IOP website at

<https://www.nisra.gov.uk/statistics/economic-output-statistics/index-production>

The Economic and Labour Market Statistics Branch statistics publication schedule is available at <https://www.nisra.gov.uk/publications/elms-publication-schedule>

SIC 2007 definitions

Manufacturing – SIC07 Section C (weight 81.6%)

The boundaries of manufacturing and the other sectors of the classification system can be somewhat blurred. As a general rule, the activities in the manufacturing section involve the transformation of materials into new products. Their output is a new product.

Water supply, sewerage, and waste management (inc. recycling) – SIC07 Section E
(weight 9.8%)

This section covers activities related to the management (including collection, treatment and disposal) of various forms of waste, such as solid or non-solid industrial or household waste, as well as contaminated sites. Activities of water supply are also grouped in this section since they are often carried out in connection with, or by units also engaged in, the treatment of sewage.

Electricity, gas, steam and air conditioning supply – SIC07 Section D (weight 6.6%)

This section includes the activity of providing electric power, natural gas, steam, hot water and the like through a permanent infrastructure (network) of lines, mains and pipes. Also included is its distribution in industrial parks or residential buildings. This, therefore, includes the operation of electric and gas utilities.

Mining and quarrying – SIC07 Section B (weight 2.0%)

This section covers the extraction of minerals occurring naturally as solids (coal and ores), liquids (petroleum) or gases (natural gas). Extraction can be achieved by different methods such as underground or surface mining, well operation, seabed mining, etc.

Next publication

The next bulletin will be published on 21st March 2018.

For further information

Statistics contact:

Dean Gordon
Economic and Labour Market Statistics Branch,
Floor 2,
Colby House,
Stranmillis Court,
Belfast BT9 5RR
Tel: (028) 9052 9655
Email: economicstats@nisra.gov.uk