Department of
Agriculture and
Rural Development
www.dardni.gov.uk
AN ROINN
Talmhaíochta agus
Forbartha Tuaithe
MÅNNYSTRIE O
Fairms an
Kintra Fordèrin

POLICY AND ECONOMICS DIVISION

Statistical Review of Northern Ireland Agriculture

2010

Agriculture, Fishing & Forestry

NATIONAL STATISTICS

A National Statistics publication

Statistical Review of Northern Ireland Agriculture 2010

Department of Agriculture and Rural Development

Policy and Economics Division

A National Statistics publication

National Statistics are produced to high professional standards set out in the National Statistics Code of Practice. They undergo regular quality assurance reviews to ensure that they meet customer needs. They are produced free from any political interference. You can also find out more about National Statistics on the Internet – go to http://www.statisticsauthority.gov.uk/

ISBN 978-1-84807-203-9
Published in March 2011 by Policy and Economics Division,
Department of Agriculture and Rural Development.
Cover designed by DARD Media Services Publications 10.11.148

CONTENTS

		Page
	List of tables and figures	iv
	Preface	viii
	Key facts	1
	Comparisons of NI and UK agriculture	2
	Trends in NI and UK livestock numbers and crop areas	3
1	Executive summary	4
2	The agricultural economy	
	A. Aggregate output, input and income	8
	B. Commodities and inputs	23
3	Crop areas and livestock numbers	35
4	Farm structure	40
5	Incomes at farm level	54
6	Statistical indicators for agri-food sector performance, the rural economy, animal health and welfare and the agri-environment	
	A. Agri-food sector performance	60
	B. Rural Economy	62
	C. Animal Health and Welfare	67
	D. Agri-Environment	72
	Appendix - statistical and methodological notes	77
	Other publications available	86

LIST OF TABLES AND FIGURES

	Table No.		Page
Aggregate output, input and income	2.1	Aggregate Agricultural Account: estimated output, input, value added and income of agriculture	11
	2.2	Summary income indicators at current prices and in real terms	13
	2.3	Output and input volume and productivity indices	13
	2.4	Estimated cash flow for agriculture	13
	2.5	Aggregate gross margin estimates for the main agricultural sectors	14
	2.6	Quantities of the main products in output	15
	2.7	Average producer prices of agricultural products	16
	2.8	Indices of producer prices of agricultural output	16
	2.9	Average market prices of breeding and store livestock	17
	2.10	Direct payments and levies included in the Aggregate Agricultural Account	18
	2.11	Capital grants and other direct payments not included in the Aggregate Agricultural Account	19
	2.12	Estimated gross annual capital investment in fixed assets and equipment	19
	2.13	Milk Quota	20
	2.14	Number of persons working on farms	20
	2.15	Agricultural manpower	20
	2.16	Gross Turnover of the food and drinks processing sector	21
	2.17	External sales of the food and drinks processing sector	21
	2.18	Estimated employment in the food and drinks processing sector and input supply sectors	22
Commodities and inputs	2.19	Output of cattle and calves	29
	2.20	Sources of home-fed finished cattle marketed	30
	2.21	Output of milk	30
	2.22	Output of sheep	30
	2.23	Output of pigs	31
	2.24	Output of poultry	31
	2.25	Output of eggs	31
	2.26	Crop production	32

	2.27	Output of potatoes, barley and wheat	33
	2.28	Output of apples and mushrooms	33
	2.29	Quantity and cost of the main items of expenditure (including interest and labour)	34
Crop areas and livestock numbers	3.1	Land use, 2010	37
	3.2	Areas of crops, grass, rough grazing and other land, June 2005-2010	37
	3.3	Livestock numbers, June 2005-2010	38
	3.4	Areas of crops, grass, rough grazing and other land by Less Favoured Area (LFA) category of farm, June 2010	39
	3.5	Livestock numbers by Less Favoured Area (LFA) category of farm, June 2010	39
Farm structure	4.1	Number and area of farms by area farmed, June 2010	43
	4.2	Number of farms, average area and distribution of area by area farmed, June 2005-2010	43
	4.3	Number of farms by business size and area farmed, June 2010	44
	4.4	Number of farms by business size, June 2005-2010	44
	4.5	Number of farms by business size and Less Favoured Area (LFA) category, June 2010	44
	4.6	Number of farms by business size and type, June 2010	45
	4.7	Number of farms by business type, June 2005-2010	45
	4.8	Number of farms by business type and Less Favoured Area (LFA) category, June 2010	45
	4.9	Number of farms by business size and proportion of area owner occupied, June 2010	46
	4.10	Area of land by type of tenure, 2005-2010	46
	4.11	Average conacre rents by type of use, 2004-2009	47
	4.12	Number of sales and average price of agricultural land by area sold, 2000-2005	47
	4.13	Distribution of the farm labour force by business size, June 2010	48
	4.14	Distribution of the farm labour force by Less Favoured Area (LFA) category, June 2010	48
	4.15	Distribution of numbers of livestock, hectares of crops, full-time labour and output by business size, June 2010	49
	4.16	Distribution of (a) dairy cows and (b) beef cows by herd size, June 2010	50

	4.17	Distribution of (a) slaughter cattle one year-old and over and (b) total cattle by herd size, June 2010	50
	4.18	Distribution of (a) ewes and (b) total sheep by flock size, June 2010	51
	4.19	Distribution of breeding sows by herd size, June 2010	51
	4.20	Distribution of (a) fattening pigs 20kg and over and (b) total pigs by herd size, June 2010	51
	4.21	Distribution of (a) laying hens and (b) broilers by flock size, June 2010	52
	4.22	Distribution of total poultry by flock size, June 2010	52
	4.23	Distribution of (a) barley and (b) wheat by area of crop, June 2010	53
	4.24	Distribution of total cereals by area of crop, June 2010	53
	4.25	Distribution of potatoes by area of crop, June 2010	53
Incomes at farm level	5.1	Indices of average cash income in real terms by farm type, 2005/06 to 2010/11	57
	5.2	Distribution of farms by cash income (CI), net farm income (NFI) and farm business income (FBI) by farm type, 2009/10	57
	5.3	Cash income by business size and farm type, 2008/09 and 2009/10	58
	5.4	Farm business income by business size and farm type, 2008/09 and 2009/10	58
	5.5	Net farm income by business size and farm type, 2008/09 and 2009/10	58
	5.6	Average tenant's capital by farm type, 2009/10	59
	5.7	Average closing valuations by farm type, 2008/09 and 2009/10	59
Agri-food sector performance	6.1	Agricultural productivity indices	61
	6.2	Performance indicators for the food and drinks processing sector in Northern Ireland	61
Rural Economy	6.3	Average gross weekly earnings per person	64
	6.4	VAT and/or PAYE based enterprises in Northern Ireland by industrial group, urban rural classification, 2010	65
	6.5	Northern Ireland net VAT registrations	66
	6.6	VAT registered enterprises by employee size-band urban-rural classification, 2010	66
Animal Health and Welfare	6.7	Confirmed cases of BSE	69

	6.8	Bovine Tuberculosis (TB) statistics	70
	6.9	Bovine Brucellosis (BR) statistics	70
	6.10	Outcomes (provisional) of on-farm animal welfare inspections completed on NI farms in 2010	71
Agri-Environment	6.11	Area of Farmland in Northern Ireland under Agri-Environmental Schemes	74
	6.12	Organic and in-conversion agricultural land area	74
	6.13	Percentage of riverwater bodies acheiving Water Framework Directive classifications overall	75
	6.14	Freshwater Fish Directive compliance failure summary	75
	6.15	Forestry area, production, forest park visitor numbers and employment in Northern Ireland	75
	6.16	Forest cover, 2005 - international comparisions	76

	Figure No.		
Population	6.1	Population Trends and Projections in Northern Ireland	64
BSE	6.2	Bovine Spongiform Encephalopathy (BSE): confirmed cases in NI including clinical and active surveillance cases	69
	6.3	Total greenhouse gas emissions in Northern Ireland by sector, 1990 & 2008	74
	6.4	Area of new forest and woodland plantings	76

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.

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.

As with all DARD statistical publications, the *Statistical Review* is now 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. These may also be obtained in hard copy form on request from Policy and Economics Division. Details of other publications and statistical releases available from Policy and Economics Division are given on page 86.

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.

Norman Fulton
Director of Policy and Economics Division
March 2011

Department of Agriculture
and Rural Development
Policy and Economics Division
Dundonald House
BELFAST
BT4 3SB

Tel. (028-) 90 524675
Fax (028-) 90 524676

E-mail Seamus.McErlean@dardni.gsi.gov.uk

KEY FACTS

	NI	UK	ROI	EU15
GROSS VALUE ADDED (GVA)				
Agriculture as % of total GVA	1.3[1,P]	0.5[2]	2.3[3]	1.8[6]
EMPLOYMENT				
Agricultural employment (‘000)	25[1]	367[1]	90[1]	...
As % of total civil employment	3.2[1]	1.3[1]	4.8[1]	3.7[6]
LAND USE				
Agricultural area (‘000 ha)	994[1]	17,464[3]	4,200[3]	128,416[6]
As % of total area	73.6[1]	77[3]	60.8[3]	39.7[6]
LESS FAVOURED AREAS (LFA)				
LFA as % of agricultural area	70.0[1]	46.9[3]	75.0[4]	60.6[6]
FARMS				
Number (‘000)	24.5[1]	326.8[3]	128[4]	5,799[6]
Average agricultural area (ha)	40.6[1]	53.8[3]	32.3[4]	26.9[6]
ENTERPRISES				
Average enterprise size:				
Dairy cows	77[1]	71[3]	50[4]	37[4]
Beef cows	17[1]	25[3]	16[4]	21[4]
Sheep	216[1]	211[3]	137[4]	168[4]
Pigs	757[1]	376[3]	1,620[4]	255[4]
Laying hens	16,000[1]	1,200[3]	330[4]	1,500[4]
Broilers	40,000[1]	36,000[3]	10,600[6]	440[4]
Cereals (ha)	13.3[1]	60.2[3]	22.4[4]	16.5[6]
Potatoes (ha)	7.2[1]	14.4[3]	3.8[4]	2.2[6]

1. 2010, 2. 2009, 3. 2008, 4. 2007, 5. 2006, 6. 2005 P= Provisional

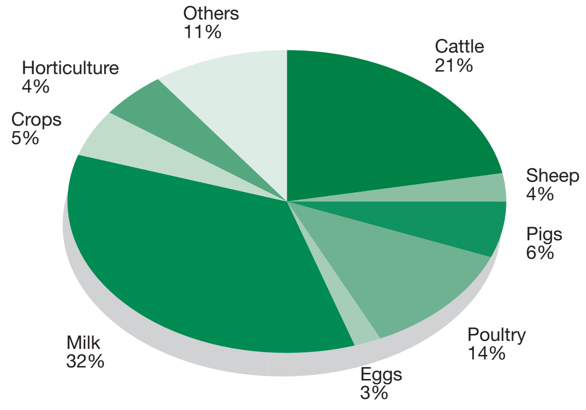
Note 1. NI = Northern Ireland; UK = United Kingdom; ROI = Republic of Ireland; EU15 = Austria, Belgium, Denmark, Finland, France, Germany, Greece, Republic of Ireland, Italy, Luxembourg, Netherlands, Portugal, Spain, Sweden and United Kingdom.

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

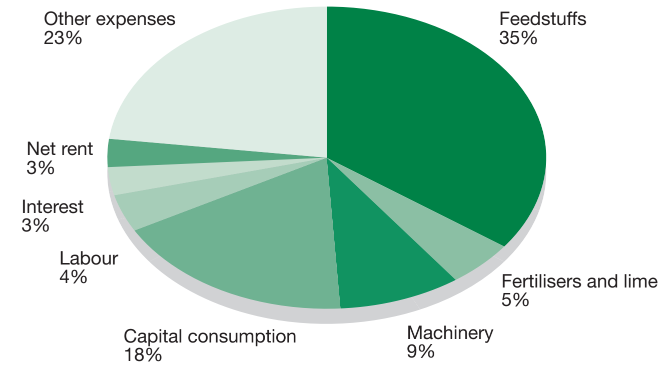
Note 3. In general, figures relate to the latest year for which statistics are available.

COMPARISONS OF NI AND UK AGRICULTURE

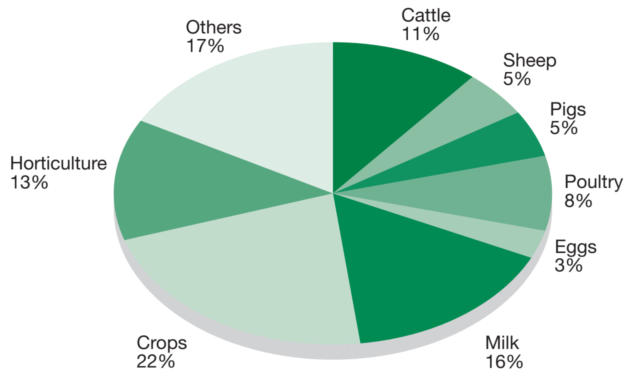
Gross output of NI agriculture, 2010



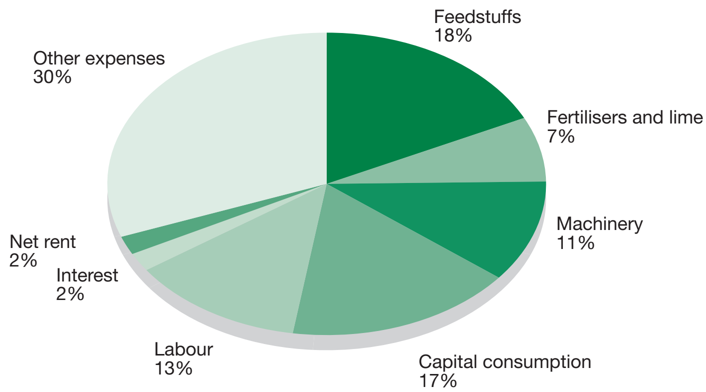
Total expenses of NI agriculture, 2010



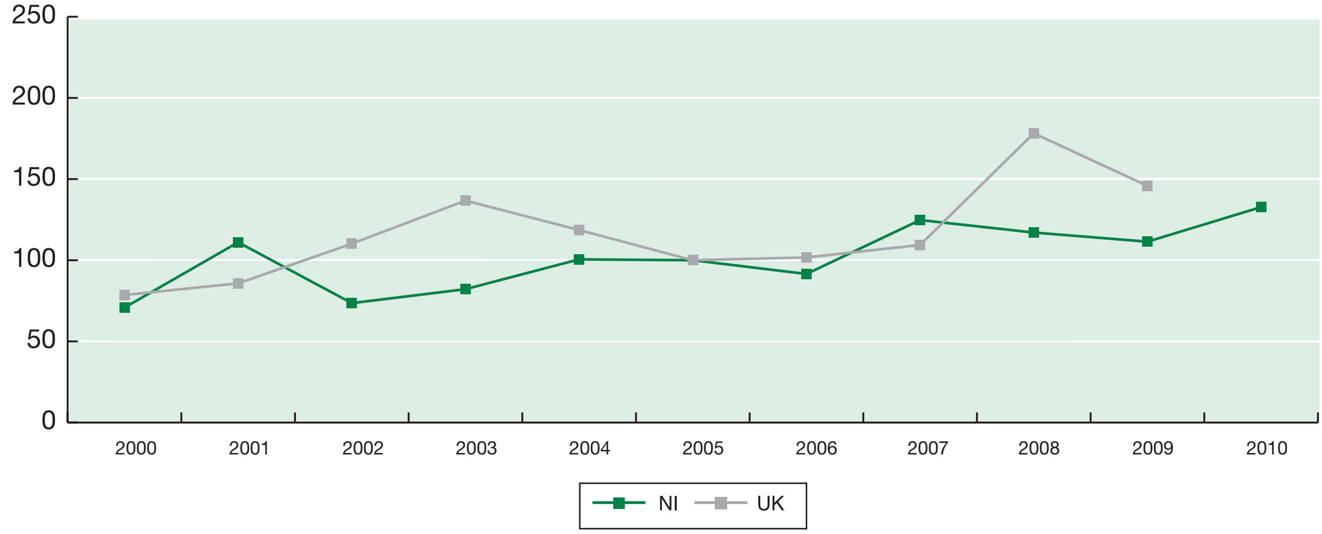
Gross output of UK agriculture, 2009



Total expenses of UK agriculture, 2009

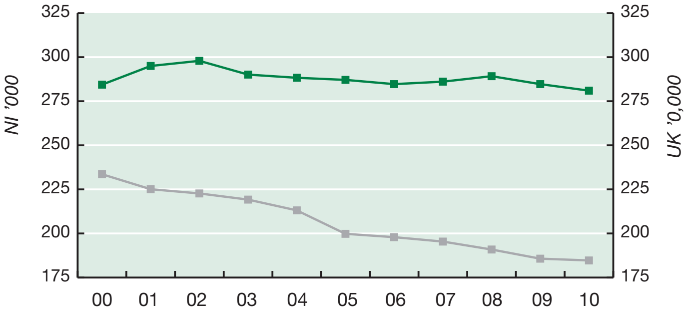


NI and UK Total Income from Farming Indices in real terms (2005 = 100)

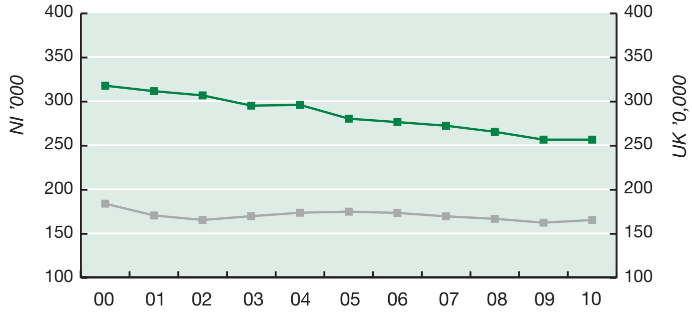


TRENDS IN NI AND UK LIVESTOCK NUMBERS AND CROP AREAS

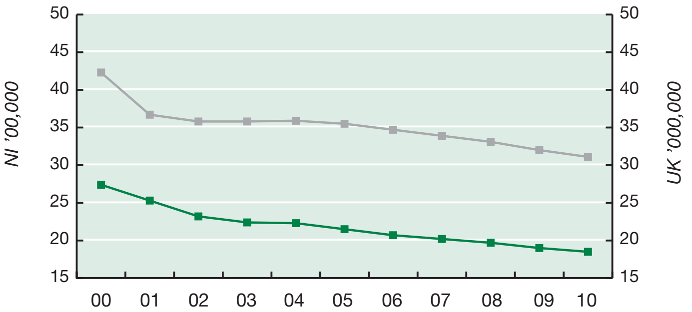
Dairy cows



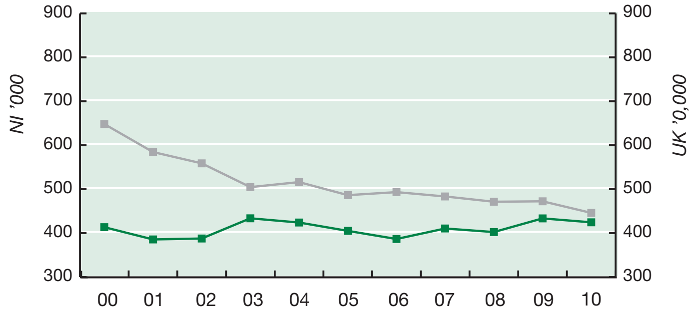
Beef cows



Sheep



Pigs



Breading and laying birds

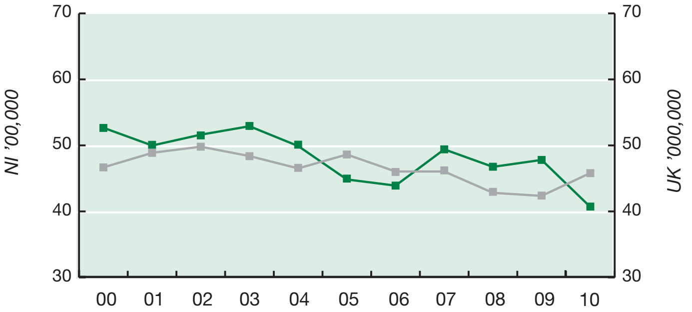
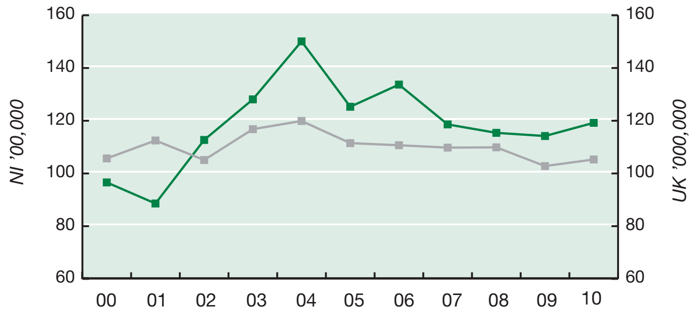
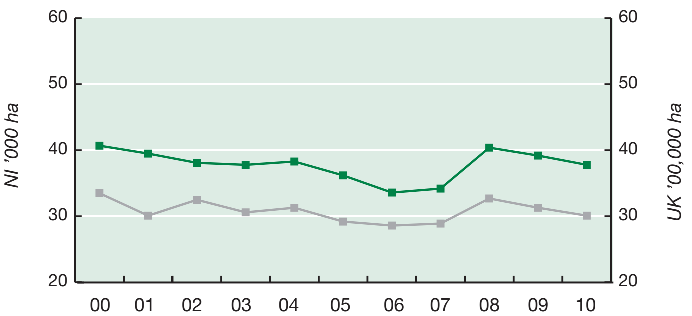


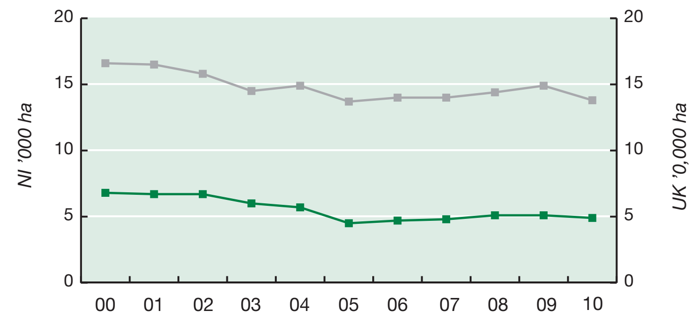
Table chickens



Cereals



Potatoes



NI UK

1. EXECUTIVE SUMMARY

Note: comparisons are with 2009 unless otherwise stated.

Aggregate income (Tables 2.1 - 2.3)

- There was a significant rise in the income of Northern Ireland agriculture in 2010.
- **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 25 per cent (19 per cent in real terms) to £274 million, from £220 million in 2009.
- Following the increase in 2010, TIFF is 15 per cent above the average of the last twenty years after accounting for inflation.
- The increase in income in 2010 can be attributed largely to a 33 per cent or £117 million increase in the total value of output from dairying. There are also increases in the output of other sectors such as pigs, poultry, eggs, cereals and potatoes, which are offset by reductions in output from the beef and sheep sectors.
- At the United Kingdom level, provisional TIFF estimates will not be released until April 2011. However, a projected figure for 2010 published in November 2010 indicated a decrease of 13 per cent to £3.3 billion.

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

- **Gross output** of Northern Ireland agriculture is estimated at £1.49 billion for 2010. This is 11 per cent above the level calculated for 2009. The output value of many commodities such as milk, pigs, eggs, poultry, cereals and potatoes increased. However, there was a 3.7 per cent decrease in beef returns and a 3.3 per cent decrease in sheep returns.
- **Gross input** (or 'intermediate consumption') increased by 4.9 per cent, to £1.11 billion. Feedstuff costs, which account for 50 per cent of the gross input figure, rose by 3.4 per cent in 2010 to £554 million. The total cost of fertiliser (excluding lime) input rose by 37 per cent to £72 million as a result of an increase in the volume of sales which was partially offset by a 2.5 per cent reduction in the price per tonne. Total machinery expenses increased by 7.9 per cent to £135 million in 2010. The increase was due to an 11.3 per cent rise in the costs of fuel and oils and a 6.2 per cent rise in machinery repair costs.
- **Gross value added** increased by 33 per cent in 2010 to £378 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 14 per cent, to £413 million.

Productivity (Table 2.3)	• Changes in the volumes of outputs and inputs combined to produce a 0.8 per cent increase 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 6.6 per cent. The increase in this index suggests that the small increase in productivity was boosted further by an improvement in the ratio between inputs costs and farm-gate prices.
Cash flow (Table 2.4)	• **Cash available to farm families from farming activity** is estimated to have fallen in 2010 by 24 per cent, to slightly less than £262 million. This large fall in 2010 was from a very high level in 2009. In this estimate, 'book' 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. A major contributing factor to the fall in available cash during 2010 was the reduction in borrowings.
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** decreased from £25,663 in 2008/09 to £21,586 in 2009/10, which is a fall of £4,077 per farm. It is expected to increase from £21,586 in 2009/10 to £25,903 in 2010/11, i.e. an increase of £4,317 or 20 per cent per farm. At the individual farm type level, the results show that Farm Business Income is expected to increase between 2009/10 and 2010/11 on Cereal and Dairy farms, but to fall for other farm types.
Subsidies (Table 2.10)	• The value of all **direct payments** to farmers decreased in 2010 by £12.5 million or 3.7 per cent, to £324 million. This decrease is attributed to a fall in Single Farm Payment as a result of exchange rate movements and higher modulation reductions (13 per cent in 2010 compared with 12 per cent in 2009). The total value of the Single Farm Payment estimated to have accrued in 2010 is almost £271 million, a net decrease of 6.5 per cent compared with 2009. Single Farm Payments account for approximately 84 per cent of all direct payments.
Labour (Table 2.14)	• The **total agricultural labour force** declined in 2010 by 2.3 per cent to just under 47,000 persons. Within this total there was a 2.9 per cent reduction in the number of full time farmers and a 1.7 per cent reduction in the number of part time farmers. The total number of full time, part time and casual workers combined decreased by 3.1 per cent and within this total part time workers fell by 1 per cent while the number of casual/seasonal workers fell by 6.4 per cent.

Livestock numbers (Table 3.3)	• The number of **cattle** recorded at 1.6 million in the June 2010 census has risen very slightly by 0.33 per cent compared with 2009. At June 2010, there were approximately 281,000 dairy cows, 1.3 per cent less than in 2009. There were 257,600 beef cows, 0.34 per cent more than in 2009. Total **sheep** numbers decreased to just under 1.85 million, while breeding ewe numbers declined by 1.8 per cent, to 875,900 ewes. Ewe numbers are now at their lowest level since 1984.
	• At June 2010, the number of **pigs** totalled 424,600, which was 2 per cent more than in 2009. The female pig breeding herd increased, by 0.8 per cent, to 38,500. **Broilers** increased by 4.4 per cent to 11.9 million birds in 2010, while the size of the **commercial laying flock** declined by 9.3 per cent to 2.1 million birds.
Crops and grass areas (Table 3.2)	• There was a 3.8 per cent increase, to 55,600 hectares, in the total **cropped area** between June 2009 and 2010. The total area of **cereals** decreased by 3.7 per cent, to around 37,800 hectares; mainly, as a result of the decrease in the area of spring barley and despite increases in winter barley, oats and wheat production.
Farm Numbers (Table 4.2)	• There were 24,471 active **farm businesses** in Northern Ireland at June 2010, which was 793 fewer than in 2009. The downward trend in the number of farms is on average 2 per cent per year from 2005 to 2010 and 2 per cent per year over the past 10 years.
Agri-Food Sector Performance	• **Total Factor Productivity** of agriculture in Northern Ireland grew slightly in 2010 after having fallen in the previous year. The performance indicators for the **food and drinks processing sector** indicate some growth over the period 2003 to 2008. However, the rate of return on capital employed shows a downward trend over this period.
Rural Economy	• Over the years from 2005 to 2010, 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 2001 to 2010.
Animal Health and Welfare	• Since the first cases of BSE were reported in Northern Ireland during 1988, there has been a total of 2,186 cases. The number of BSE cases in Northern Ireland has declined significantly since the peak in 1993. There were no new cases in 2010.

During 2009, 1,293 new herds in Northern Ireland were affected by bovine tuberculosis, compared with 1,513 new incidents in 2006 and 1,274 new incidents in 2008. There were 71 new herds that were newly infected with brucellosis in 2009 compared with 118 in 2006 and 177 in 2008.

The Veterinary Service (DARD) carried out 845 on-farm welfare inspections in 2010. Of those inspections carried out in 2010 as a result of complaints, risk assessment (related to cross-compliance) and targeted visits 81 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 2010, some 464,000 hectares or 42 per cent of farmland was registered in an agri-environmental scheme in Northern Ireland. In 2009, 25 per cent of river water-bodies were classified as 'high' or 'good'. This is an increase of four percentage points compared with 2008. At around 6 and 10 per cent respectively, Northern Ireland and the Republic of Ireland are the two least densely forested parts of the EU. In 2008, agriculture was estimated to contribute 24 per cent of all greenhouse gas emissions in Northern Ireland.
  Total emissions from agriculture fell by 10 per cent between 1990 and 2008.

Contact: Seamus McErlean, Tel. (028-) 90 524675,
E-mail. Seamus.McErlean@dardni.gsi.gov.uk

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 2009 unless otherwise stated.

Summary

The estimated income of Northern Ireland agriculture increased significantly in 2010. **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 their families working on farms) – increased by 25 per cent (a 19 per cent increase in real terms) to £274 million, from £220 million in 2009 (see Table 2.1).

Output

The value of **gross output** is estimated at £1.49 billion in 2010, which is an increase of 11 per cent compared with 2009. The rise is explained primarily by increases in the value of output for the milk, pigs, poultry, eggs, cereal and potato sectors which combined to more than offset increases in the beef and sheep sectors. 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 2010, by 4.9 per cent, to £1.11 billion. Most of this increase is explained by additional expenditure on feedstuffs, fertiliser and machinery expenses. There was a larger than expected decrease in fertiliser expenditure in 2009 and this may be part of the reason why the volume of fertiliser and lime sales rose by 42 per cent in 2010. 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 33 per cent in 2010 to £378 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 14 per cent, to £413 million. The increase in Net value added occurred despite a decrease of 3.7 per cent in direct subsidies.

Net value added is the sum of all 'incomes' arising in the industry, namely the earnings of paid labour, interest on borrowed capital, rent on conacre land (paid to non-farming persons) and the residual 'total income from farming'. The cost of paid labour (also termed 'compensation of employees') fell by 2.5 per cent in 2010, to £55.4 million. The cost of borrowings in agriculture was £38.6 million in 2010, 5.2 per cent lower than 2009. In 2010, interest rates remained low and there was a 2.5 per cent reduction in the level of borrowings. Conacre rent paid to non-farmers remained at a similar level to 2009.

Total Income from farming

The net result of these changes was that **total income from farming (TIFF)** increased in 2010, by 25 per cent to £274 million, a rise of 19 per cent after allowing for inflation. Following the increase in 2010, TIFF is 15 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 1991 to 2010, the number of units of entrepreneurial labour decreased by 30 per cent with the result that, in real terms, TIFF per unit of entrepreneurial labour in 2010 was 39 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 'book' 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** is estimated to have fallen in 2010 by 24 per cent, to £262 million, from the very high level in 2009.

Subsidies

Total direct payments to farmers decreased in 2010 by £12.5 million or 3.7 per cent, to £324 million. This fall is attributed mainly to a decrease in the value of the Single Farm Payment as a result of exchange rate movements and higher modulation reductions (13 per cent in 2010 compared with 12 per cent in 2009). The total value of the Single Farm Payment estimated to have accrued in 2010 is £271 million, a net decrease of 6.5 per cent or £18.9 million compared with 2009. Single Farm Payments account for approximately 84 per cent of all direct payments. Direct payments exclude the value of market support such as intervention purchases and export refunds.

Investment **Gross annual capital investment** decreased significantly in 2010 by around £174 million to £220 million. Within this total there was a slight increased investment in plant and machinery, while all other types of investment fell. Granted aided investment fell by around £108 million.

Contact: Seamus McErlean, Tel. (028-) 90 524675,
E-mail. Seamus.McErlean@dardni.gsi.gov.uk

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

£ million

	2005	2006	2007	2008	2009	2010 (provisional)
OUTPUT[2]						
Livestock and livestock products[3]						
Finished cattle and calves[4]	243.3	238.6	269.2	323.4	329.6	317.5
Finished sheep and lambs[5]	43.7	51.8	39.1	49.9	57.5	55.6
Finished pigs	61.7	62.4	66.0	76.8	91.7	93.8
Poultry[6]	136.0	138.8	149.3	182.3	202.5	212.8
Eggs[7]	21.7	22.5	29.0	35.2	43.8	50.2
Milk	343.4	328.4	427.3	445.0	353.8	470.4
Minor products[8]	8.5	8.8	8.9	10.1	10.6	12.1
Total livestock and livestock products	**858.3**	**851.4**	**988.7**	**1,122.7**	**1,089.6**	**1,212,4**
Field crops						
Potatoes	13.3	19.6	21.7	20.5	21.9	22.8
Cereals[9]	15.9	18.6	28.5	34.3	25.6	34.4
of which: barley[9]	9.8	10.9	17.0	19.0	15.4	18.8
wheat[9]	5.3	6.6	10.1	13.7	8.9	13.7
oats[9]	0.8	1.1	1.5	1.6	1.3	1.9
Other crops[9,10]	8.3	10.0	11.8	11.2	14.2	12.8
Total field crops	**37.4**	**48.2**	**62.0**	**66.0**	**61.8**	**70.1**
Horticultural products						
Fruit	4.9	8.4	11.3	9.5	4.5	7.1
Vegetables	15.1	16.2	19.0	16.0	14.6	13.5
Mushrooms	24.2	19.4	23.0	22.4	19.9	19.7
Ornamental and hardy nursery stock	14.3	12.0	11.2	11.7	11.6	12.1
Total horticultural products	**58.4**	**56.0**	**64.4**	**59.6**	**50.6**	**52.4**
Capital formation (breeding livestock)	51.2	39.5	56.6	82.5	65.3	75.3
Agricultural contract work[11]	47.9	48.7	52.4	60.2	60.6	63.1
Milk quota leasing	0.7	0.0	0.0	0.0	0.0	0.0
Inseparable non-agricultural activities[12]	17.1	17.3	17.0	17.3	17.3	17.4
A Gross output	***1,071.0***	***1,061.1***	***1,241.1***	***1,408.3***	***1,345.2***	***1,490.6***
of which:						
subsidies (less taxes) on products[13]	*26.0*	*7.7*	*4.2*	*4.5*	*0.0*	*3.7*

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 Over Thirty Months Scheme and 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.

Table 2.1 contd.

						£ million
	2005	**2006**	**2007**	**2008**	**2009**	**2010 (provisional)**
A Gross output	**1,071.0**	**1,061.1**	**1,241.1**	**1,408.3**	**1,345.2**	**1,490.6**
INPUT (also known as 'intermediate consumption')						
Expenditure						
Feedstuffs[14]	362.6	368.2	430.7	522.0	535.9	553.9
Seeds[15]	7.4	7.0	7.8	8.7	9.4	8.6
Marketing expenses[16]	32.6	31.0	31.9	33.4	33.5	31.9
Fertilisers and lime	53.2	54.1	49.2	83.9	53.2	73.1
Total machinery expenses (excl. depreciation)	92.0	96.5	105.6	122.7	125.3	135.1
Farm maintenance	31.0	31.8	35.6	40.1	42.9	45.1
Veterinary expenses and medicines	36.1	37.1	40.4	44.3	47.1	48.7
Other variable costs[17]	63.1	63.4	73.8	80.8	82.2	81.0
Miscellaneous expenses[18]	60.6	61.7	64.3	67.1	71.0	72.2
Agricultural contract work	47.9	48.7	52.4	60.2	60.6	63.1
Milk quota leasing	2.0	0.0	0.0	0.0	0.0	0.0
B Gross input	**788.4**	**799.5**	**891.6**	**1,065.3**	**1,061.0**	**1,112.7**
C Gross value added (A-B)	**282.6**	**261.6**	**349.5**	**344.9**	**284.1**	**377.9**
Consumption of fixed capital						
- livestock	45.6	33.2	49.0	68.5	50.2	68.5
- plant, machinery and vehicles	81.9	83.3	86.2	91.1	100.3	107.8
- buildings and works	91.1	91.9	93.6	96.9	100.7	101.4
D Total consumption of fixed capital	**218.6**	**208.4**	**228.8**	**256.4**	**251.2**	**277.7**
Other subsidies (not paid on products)[19]	257.8	262.1	275.3	304.7	336.5	320.3
Other taxes (not levied on products)[20]	5.9	6.1	6.4	6.8	7.1	7.4
E Other subsidies (less taxes)	251.9	256.0	268.9	297.9	329.4	313.0
F Net value added (at factor cost) (C-D+E)	**315.9**	**309.2**	**389.6**	**386.5**	**362.3**	**413.1**
G Paid labour	52.7	52.3	54.5	54.7	56.9	55.4
H Interest	42.6	45.5	54.4	53.8	40.7	38.6
I Net rent[21]	43.5	44.2	42.9	46.0	45.1	45.4
J Total income from farming[22] (F-G-H-I)	**177.1**	**167.2**	**237.7**	**232.0**	**219.7**	**273.7**

9. Includes Arable Area Payments but excludes set-aside payments,which are included in 'other subsidies'.
10. Hay, straw, flax, linseed, oilseed rape, mixed corn, protein crops, lawn turf, triticale, hemp, forage crops and associated Arable Area Payments.
11. Receipts to both farmer contractors and specialist contractors.
12. Receipts from non-agricultural activities which use farm resources.
13. See Table 2.10 for details of the individual items included within this item.
14. Includes home-fed cereals, proteins, forage crops, hay and stockfeed potatoes.
15. Includes home-saved seed.
16. Hired transport charges, auction fees, slaughter charges and inter farm expenses.
17. Livestock costs other than veterinary and medicines, crop protection, other crop costs, packaging and royalties and levies.
18. Electricity, heating fuel, water rates, fire insurance and other overheads.
19. Includes Single Farm Payment, LFA Compensatory Allowance, set-aside payments, payments for the non-capital element of the Environmentally Sensitive Area 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

	2005	2006	2007	2008	2009	2010 (provisional)
Index at current prices						
Net value added[1]	100.0	97.9	123.3	122.3	114.7	130.8
Total income from farming[1]	100.0	94.4	134.2	131.0	124.0	154.6
Index in real terms[2]						
Net value added	100.0	94.9	114.6	109.3	103.0	112.3
Total income from farming	100.0	91.5	124.7	117.1	111.4	132.7

1. For definitions see Appendix.
2. Deflated by the Retail Prices Index.

Table 2.3 Output and input volume and productivity indices

Indices: 2005 = 100

	2005	2006	2007	2008	2009	2010 (provisional)
Gross output volume[1]	100.0	100.3	104.1	101.7	99.6	101.7
Gross input volume[1]	100.0	98.7	98.0	101.3	104.9	106.0
Gross value added volume[1]	100.0	102.3	111.9	102.2	92.9	96.2
Net value added volume[1]	100.0	105.3	119.9	101.7	85.4	89.8
Total factor productivity[2]	100.0	103.1	107.7	102.9	98.1	98.9
Labour productivity[3]	100.0	106.6	123.7	105.6	90.5	96.8
Single factorial terms of trade[4]	100.0	105.6	108.6	96.9	97.6	104.1

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

	2005	2006	2007	2008	2009	2010 (provisional)
Total income from farming	**177.1**	**167.2**	**237.7**	**232.0**	**219.7**	**273.7**
Less:						
output stock change	-6.7	-9.1	-17.1	1.5	0.3	0.8
gross fixed capital formation (breeding livestock)	51.2	39.5	56.6	82.5	65.3	75.3
capital investment[1]	178.2	185.5	257.8	353.7	184.6	210.6
Plus:						
input stock change	0.1	0.4	-1.0	-0.2	2.1	-1.7
capital consumption	218.6	208.4	228.8	256.4	251.2	277.7
capital grants paid in year[2]	1.6	17.8	20.9	34.2	67.9	21.5
change in borrowings	-7.8	40.0	86.4	78.3	55.8	-22.8
Cash available to farm families from farming	**166.9**	**217.9**	**275.5**	**163.0**	**346.5**	**261.7**

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

2009 (Final)

Sector	Adjusted outputs[1]	Estimated specific costs[2] Feedstuffs	Fertilisers, seeds & sprays	Others	Total	Sector gross margins[3]	
	£m	£m	£m	£m	£m	£m	%
Dairy cows and followers	422.0	123.4	15.6	9.6	148.6	273.5	47.7%
Beef cattle, rearing and fattening	276.3	149.5	25.6	22.2	197.3	79.0	13.8%
Sheep and wool	58.5	148.8	8.1	4.1	27.1	31.4	5.5%
Total grazing livestock	**756.8**	**287.7**	**49.3**	**36.0**	**373.0**	**383.9**	**67.0%**
Pigs	91.7	52.6	-	2.7	55.3	36.3	6.3%
Poultry	246.4	189.4	-	7.3	196.7	49.8	8.7%
Total pigs and poultry	**338.1**	**242.0**	**-**	**10.0**	**252.0**	**86.1**	**15.0%**
Cereals	39.4	-	11.8	-	11.8	27.6	4.8%
Potatoes	21.9	-	5.7	-	5.7	16.2	2.8%
Total field crops	**61.3**	**-**	**17.5**	**0.1**	**17.5**	**43.8**	**7.6%**
Horticulture[4]	50.6	-	10.5	5.2	15.7	34.9	6.1%
Other items	32.9	6.3	1.8	0.2	8.3	24.5	4.3%
Total	**1,239.7**	**536.0**	**79.1**	**51.4**	**666.5**	**573.1**	**100.0%**

2010(Provisional)

Sector	Adjusted outputs[1]	Estimated specific costs[2] Feedstuffs	Fertilisers, seeds & sprays	Others	Total	Sector gross margins[3]	
	£m	£m	£m	£m	£m	£m	%
Dairy cows and followers	528.2	143.7	20.6	10.4	174.8	353.5	54.1%
Beef cattle, rearing and fattening	266.7	131.1	35.1	22.9	189.1	77.6	11.9%
Sheep and wool	57.2	13.1	11.5	4.9	29.4	27.7	4.2%
Total grazing livestock	**852.0**	**287.9**	**67.2**	**38.1**	**393.3**	**458.7**	**70.1%**
Pigs	93.8	67.4	-	2.4	69.9	23.9	3.7%
Poultry	263.0	192.5	-	6.8	199.3	63.7	9.7%
Total pigs and poultry	**356.7**	**259.9**	**-**	**9.2**	**269.1**	**87.6**	**13.4%**
Cereals	46.3	-	13.5	-	13.6	32.7	5.0%
Potatoes	22.7	-	7.1	-	7.1	15.6	2.4%
Total field crops	**69.0**	**-**	**20.6**	**0.1**	**20.7**	**48.3**	**7.4%**
Horticulture[4]	49.6	-	10.7	5.7	16.4	33.2	5.1%
Other items	34.6	6.4	1.9	0.2	8.5	26.1	4.0%
Total	**1,362.0**	**554.3**	**100.5**	**53.2**	**708.0**	**654.0**	**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	2005	2006	2007	2008	2009	2010 (provisional)
Livestock and livestock products							
Cattle and calves[2,3]	tonnes dcw	132,300	139,686	157,397	140,749	143,299	147,354
Over Thirty Months Scheme[4]	tonnes carcase wt	29,995	2,531	-	-	-	-
Sheep and lambs	tonnes dcw	21,212	23,348	21,094	18,818	19,069	17,032
Pigs[5]	,,	67,558	66,995	71,648	70,155	73,679	79,289
Cattle and calves[2]	'000 head	406	445	507	448	453	473
Older Cattle Disposal Scheme	,,	-	22.5	19.0	19.5	-	-
Sheep and lambs	,,	956	1,051	957	862	858	763
Pigs[5]	,,	839	826	892	868	886	962
Poultry[6]	'000 tonnes lwt	228.9	235.3	247.4	242.4	256.6	264.9
Eggs[7]	m. doz	60.1	56.3	57.1	61.5	64.7	78.6
Milk[8]	m. litres	1,870	1,909	1,921	1,906	1,775	1,852
Field crops							
Wheat	'000 tonnes	64.9	67.1	67.4	83.9	80.2	81.1
Barley	,,	127.9	115.4	117.7	126.7	134.4	137.7
Oats	,,	11.4	10.5	10.2	11.3	10.3	12.5
Potatoes	,,	173.1	170.9	183.7	171.8	183.1	186.9
Horticultural crops							
Fruit	'000 tonnes	44.4	40.4	69.4	55.0	37.9	42.2
Vegetables	,,	52.7	49.5	56.1	50.3	41.5	35.0
Mushrooms	,,	19.6	17.0	18.5	18.2	16.4	16.3

1. Estimated home-produced sales, on-farm use and household consumption. See Footnote 2 to Table 2.1.
2. Excludes cattle slaughtered under the Over Thirty Months Scheme.
3. Due to a change from EC to UK Dressing Specification in week 4 of January 2009, prices expressed in kilograms and dressed carcase weights for 2009 are not directly comparable with previous years.
4. Cattle processed under the Over Thirty Months Scheme are not dressed to a normal carcase specification. Therefore, care must be taken when comparing the weight of beef processed under this Scheme with the weight of beef sold for human consumption.
5. Includes exports of store pigs.
6. Excludes shipments and exports of breeding and non-breeding birds and hatching eggs.
7. Includes eggs for processing and duck eggs.
8. Includes farmhouse comsumption.

Table 2.7 Average producer prices[1] of agricultural products

£ per unit

	Unit	2005	2006	2007	2008	2009	2010 (provisional)
Finished steers, heifers and young bulls[2]	head	588	629	642	822	864	841
Finished steers, heifers and young bulls[2,3]	kg dwt	1.78	1.92	1.93	2.48	2.61	2.55
Calves slaughtered or exported	head	68	93	94	117	117	132
Culled cows and bulls[2]	head	232	437	462	588	605	617
Culled cows and bulls[2,3]	kg dwt	0.95	1.40	1.43	1.89	1.97	1.95
Older cattle disposal scheme	head	-	245	222	231	-	-
Store cattle exported	head	414	434	439	533	580	607
Finished sheep and lambs	head	51	52	52	61	71	80
Finished sheep and lambs	kg dwt	2.36	2.45	2.43	2.91	3.32	3.75
Finished clean pigs	head	76	79	78	93	110	105
Finished clean pigs	kg dwt	0.96	0.99	0.99	1.16	1.33	1.28
Culled sows and boars	head	80	80	76	144	138	133
Milk[4]	litre	0.183	0.172	0.222	0.233	0.199	0.254
Eggs for consumption	dozen	0.361	0.400	0.509	0.573	0.678	0.639
Broilers	kg lwt	0.507	0.508	0.531	0.666	0.708	0.715
Potatoes:							
Ware maincrop[5]	tonne	88	117	134	126	125	125
Seed	tonne	95	125	172	171	176	173
Barley	tonne	83	95	142	145	111	135
Wheat	tonne	86	100	148	145	121	152
Mushrooms	tonne	1,232	1,144	1,243	1,232	1.213	1,210
Apples	tonne	122	168	171	148	152	137

1. Before deduction of marketing charges, commissions and levies, where applicable.
2. Includes cattle slaughtered under the Over Thirty Months Scheme up until 2006.
3. See note 3 Table 2.6
4. Before deduction of superlevy, if applicable.
5. Does not include early potatoes. Therefore, the price differs from that quoted in Table 2.26.

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

Indices: 2005 = 100

	Weights[2]	2005	2006	2007	2008	2009	2010 (provisional)
Finished steers and heifers[3]	241	100	108	108	139	147	143
Culled cows and bulls[3]	28	100	147	150	198	208	205
Store cattle exported	3	100	105	106	129	140	147
Finished sheep and lambs	44	100	104	103	124	141	159
Finished clean pigs	66	100	103	103	121	139	133
Culled sows and boars	1	100	100	97	178	183	182
Milk	357	100	94	121	127	109	139
Eggs for consumption	23	100	111	141	159	188	177
Broilers	109	100	100	105	131	140	141
Potatoes:							
Ware maincrop	12	100	133	153	143	141	142
Seed	2	100	132	181	180	185	181
Barley	11	100	114	171	175	133	163
Wheat	6	100	117	173	169	141	177
Mushrooms	25	100	93	101	100	98	98
Apples	6	100	138	140	121	125	112
Total products index[2]	**932**	**100**	**102**	**116**	**134**	**131**	**143**
Inputs index[4]	**1,000**	**100**	**100**	**115**	**142**	**132**	**136**

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. Includes cattle slaughtered under the Over Thirty Months Scheme.
4. 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

	2005	2006	2007	2008	2009	2010
CATTLE						
Breeding cattle						
Dairy cows/heifers in milk	664	669	888	1,120	988	1,188
Dairy cows in calf	477	534	635	910	878	1,102
Dairy springing heifers	440	527	775	1,094	948	1,041
Beef cows/heifers with calf at foot	529	592	609	781	879	923
Beef cows in calf	427	480	502	588	711	757
Beef springing heifers	502	493	541	682	831	895
Store cattle						
150-300 kg steers	309	323	331	393	430	445
300-400 kg steers	399	405	410	493	537	556
400-500 kg steers	471	491	487	604	649	658
Over 500 kg steers	564	603	601	764	820	808
150-300 kg heifers	275	283	288	338	383	422
300-400 kg heifers	355	369	373	448	490	526
400-500 kg heifers	434	466	462	571	621	642
Over 500 kg heifers	515	557	563	713	768	768
Suckled calves						
Under 200 kg steers	156	208	243	239	257	274
Over 200 kg steers	352	398	373	444	498	524
Under 200 kg heifers	166	206	228	238	286	309
Over 200 kg heifers	289	328	322	388	436	476
Dropped calves						
For rearing	69	88	95	118	120	136
Cull cows	280	358	377	521	557	557
SHEEP						
Breeding ewes/hoggets						
Blackface	47.04	60.90	74.27	70.74	85.27	116.61
Blackface Cross	75.15	71.79	61.85	71.05	92.52	109.77
Other breeds	65.12	62.20	65.98	72.65	96.95	119.33
Breeding ewe lambs						
Blackface	24.92	33.04	34.22	49.64	60.60	80.85
Blackface Cross	47.29	44.11	36.54	49.15	64.30	75.43
Other breeds	42.11	47.99	47.30	56.45	66.10	76.93
Breeding ewes/hoggets with lamb(s) at foot						
Blackface	43.31	42.28	44.87	52.02	72.00	76.65
Blackface Cross	45.44	63.00	68.00	75.30	99.79	137.57
Other breeds	70.49	75.44	73.86	83.32	109.01	139.71
Cull ewes						
Blackface	14.41	15.21	20.13	19.23	33.14	42.24
Blackface Cross	17.05	18.65	17.23	22.98	48.66	59.64
Other breeds	27.86	31.02	30.34	35.63	55.98	66.99
Cull rams	33.06	34.55	35.23	40.62	59.71	70.39
Store lambs	30.87	33.77	31.92	36.33	44.86	57.99

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]

	2005[4]	2006[4]	2007[4]	2008[4]	2009[4]	2010[4] (provisional)
DIRECT PAYMENTS[5]						
Single farm payment	**224.4**	**226.0**	**228.6**	**255.3**	**290.2**	**271.3**
Cattle						
Over Thirty Months Scheme[6]	26.0	2.2	-	-	-	-
Older Cattle Disposal Scheme	-	5.5	4.2	4.5	-	-
Beef Quality Initiative	0.8	0.6	0.5	0.2	0.1	0.0
Total cattle	**26.8**	**8.3**	**4.7**	**4.8**	**0.1**	**0.0**
Milk						
EU Dairy Fund	-	-	-	-	-	3.7
Total milk	**-**	**-**	**-**	**-**	**-**	**3.7**
Other direct payments						
Environmentally Sensitive Areas (non-capital)	4.9	4.8	7.4	7.7	6.5	6.6
LFA Compensatory Allowance	21.8	21.0	21.0	22.0	22.5	24.7
Countryside Management Scheme (non-capital)	5.8	10.2	16.9	18.5	16.2	17.1
New Entrants Scheme	0.0	0.0	0.2	0.5	0.9	0.6
Others[7]	0.4	0.5	0.6	0.4	0.2	0.1
Total other direct payments	**32.9**	**36.5**	**46.2**	**49.1**	**46.2**	**49.0**
Total direct payments	**284.0**	**270.9**	**279.5**	**309.2**	**336.5**	**324.0**
LEVIES[8]						
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 3% (0% on first €5,000) in 2005 , 8.5% (4.5% on first €5,000) in 2006, 9.5% (4.5% on first €5,000) in 2007, 11% (6% on first €5,000) in 2008, 12% (7% on first €5,000) in 2009 and 13% (8% on first €5,000) in 2010.
After application of €5,000 franchise per farm from 2005, total modulation amounted to £4.5 million in 2005, £17.5 million in 2006, £19.7 million in 2007, £26.7 million in 2008, £33.4 million in 2009 and £34.7 million in 2010.
5. Excludes expenditure on market regulation (such as intervention purchases and export refunds) by the UK Rural Payments Agency.
6. Gross producer receipts before marketing expenses.
7. Includes Organic Farming Scheme and other miscellaneous payments.
8. Excludes non-government levies.

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

£ million[2]

	2005	2006	2007	2008	2009	2010 (provisional)
CAPITAL GRANTS						
Environmentally Sensitive Areas	-	-	0.3	0.4	0.2	-
Countryside Management Scheme	-	-	0.6	0.8	0.4	-
Investment in agricultural holdings	1.3	2.7	0.1	-	-	-
Organic Farming (Conversion of Animal Housing) Scheme	0.8	0.8	0.4	-	-	-
Farm Nutrient Management Scheme	0.4	12.2	16.7	92.5	-	-
Farm Modernisation Scheme	-	-	-	-	2.2	2.1
Total capital grants	**2.4**	**15.7**	**18.0**	**93.6**	**2.8**	**2.2**
OTHER DIRECT PAYMENTS						
Other animal disease compensation[3]	11.5	11.3	15.3	16.2	12.7	12.9
Total other direct payments[4]	**11.5**	**11.3**	**15.3**	**16.2**	**12.7**	**12.9**

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

	2005	2006	2007	2008	2009	2010 (provisional)
Grant-aided investment[2]	5.2	28.5	31.2	49.6	114.2	6.0
Non-aided investment	35.0	64.9	78.1	148.8	148.3	75.0
Total buildings and works[3]	**40.2**	**93.4**	**109.3**	**198.4**	**262.5**	**81.0**
Plant and machinery	79.0	82.8	101.8	104.4	119.8	127.8
Vehicles[3,4]	12.5	9.0	13.8	13.0	11.3	11.0
Total plant, machinery and vehicles	**91.5**	**91.8**	**115.6**	**117.4**	**131.0**	**138.8**
Total investment	**131.7**	**185.2**	**224.9**	**315.8**	**393.6**	**219.8**

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

	2005	2006	2007	2008	2009	2010 (provisional)
Milk quota (million litres):						
Owned[1]	1,769.6	1,817.0	1,853.1	1,879.1	1,914.1	1,918.0
Leased[2]	69.3	12.7	-1.3	4.5	2.2	0.0
Total	**1,838.9**	**1,829.7**	**1,851.8**	**1,883.6**	**1,916.3**	**1,918.0**

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

	2005	2006	2007	2008	2009	2010
AGRICULTURAL LABOUR FORCE[1]						
Farmers and partners						
Full time	18,159	17,981	17,185	16,931	16,437	15,965
Part time	14,367	14,013	14,022	14,166	13,830	13,596
Total	**32,526**	**31,994**	**31,207**	**31,097**	**30,267**	**29,561**
Spouses of farmers	**6,186**	**6,285**	**6,345**	**6,229**	**6,221**	**6,206**
Other workers						
Full time	2,553	2,531	2,946	3,089	3,106	3,109
Part time	2,514	2,347	2,696	2,803	3,220	3,187
Casual/seasonal	7,294	6,795	5,780	5,746	5,217	4,885
Total other workers	**12,361**	**11,673**	**11,422**	**11,638**	**11,543**	**11,181**
Total agricultural labour force	**51,073**	**49,952**	**48,974**	**48,964**	**48,031**	**46,948**
Annual Work Units (AWUs)[2]	**30,002**	**29,622**	**29,071**	**28,894**	**28,314**	**27,820**

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

	2005	2006	2007	2008	2009	2010
MANPOWER STATISTICS[1]						
Self-employed						
Male	17,106	16,918	16,261	16,049	15,622	15,154
Female	1,053	1,063	924	882	815	811
Total	**18,159**	**17,981**	**17,185**	**16,931**	**16,437**	**15,965**
Employees						
Male	10,939	10,285	10,085	10,126	10,047	9,704
Female	1,422	1,388	1,337	1,512	1,496	1,477
Total	**12,361**	**11,673**	**11,422**	**11,638**	**11,543**	**11,181**
Total agricultural manpower	**30,520**	**29,654**	**28,607**	**28,569**	**27,980**	**27,146**

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]

£ million

	2004	2005	2006	2007	2008	2009 (provisional)
Animal by-products	17	17	17	16	17	18
Bakeries	175	179	191	218	244	249
Beef and sheepmeat	586	600	643	658	728	817
Drinks	291	274	286	315	339	320
Eggs	34	31	33	46	61	70
Fish	77	78	78	67	70	70
Fruit and vegetables	138	148	157	174	183	179
Milk and milk products	612	588	600	693	819	775
Pigmeat	191	170	161	178	181	218
Poultrymeat	372	440	429	474	483	511
Total processing sector	**2,492**	**2,525**	**2,595**	**2,839**	**3,126**	**3,228**

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*", DARD. Figures for 2009 have been estimated by adjusting the 2008 baseline, largely on the basis of information available within DARD.

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

£ million

	2004	2005	2006	2007	2008	2009 (provisional)
Animal by-products	15	14	15	15	15	16
Bakeries	60	57	68	84	101	102
Beef and sheepmeat	356	374	398	422	487	546
Drinks	141	145	149	173	203	192
Eggs	26	25	25	21	36	42
Fish	55	54	54	51	54	54
Fruit and vegetables	79	87	91	98	104	98
Milk and milk products	430	414	426	505	606	574
Pigmeat	103	96	89	105	106	128
Poultrymeat	289	354	372	408	390	412
Total processing sector	**1,554**	**1,621**	**1,686**	**1,881**	**2,101**	**2,163**

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*.

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

full-time equivalents

	2004	2005	2006	2007	2008	2009 (provisional)
Processing of products[1]						
Animal by-products	170	164	164	142	132	134
Bakeries	3,134	3,015	3,107	3,292	3,277	3,389
Beef and sheepmeat	2,846	2,893	3,039	3,170	3,316	3,335
Drinks	1,407	1,246	1,179	1,258	1,289	1,219
Eggs	172	181	171	211	221	229
Fish	861	792	764	674	633	621
Fruit and vegetables	1,673	1,754	1,870	1,811	1,881	1,803
Milk and milk products	2,423	2,352	2,310	2,320	2,321	2,352
Pigmeat	1,572	1,442	1,314	1,325	1,346	1,348
Poultrymeat	4,261	4,890	4,498	4,350	4,626	4,769
Total processing sector	**18,517**	**18,726**	**18,414**	**18,550**	**19,040**	**19,197**
Manufacture and supply of inputs[2]						
Animal feed	780	790	...	...	...	750
Fetilisers and lime	230	210	...	...	...	200
Other requisites (incl. medicines)	830	830	...	...	...	900
Farm machinery (incl. servicing)	870	870	...	...	...	790
Services[2]	1,210	1,190	...	...	...	1,150
Total supply sector	**3,920**	**3,890**	**...**	**...**	**...**	**3,790**

1. See note 1 Table 2.16
2. Estimated from trade directory information and other DARD sources.
3. 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 2010 increased by 9,579 or 3 per cent to 352,200 head. The number of slaughtered steers decreased by 6 per cent and the number of heifers slaughtered decreased by 1 per cent. The number of young bulls slaughtered increased by 40 per cent to 76,000. The proportion of steers slaughtered reduced from 45 per cent in 2009 to 41 per cent in 2010 while the proportion of heifers reduced from 39 per cent in 2009 to 37 per cent in 2010. The proportion of young bulls slaughtered increased from 16 per cent in 2009 to 22 per cent in 2010.

Average dressed carcase weights in 2010 were broadly consistent with 2009 levels at 330 kg. In total, the volume of clean beef output rose by 2 per cent to 116,000 tonnes. Average producer price decreased by 3 per cent to £841 per head for clean cattle. The overall result of these changes was that the sales value of finished clean cattle remained broadly consistent with 2009 levels at £296 million.

Sales of culled cows and bulls increased by 1 per cent in 2010 to 92,100 head. Average carcase weights for these animals increased by 3 per cent to 316 kg. The average price of culled cows and bulls was up by 2 per cent on 2009 levels at £617 per head. Overall, total receipts from cull cattle sales, increased by 3 per cent to £57 million in 2010.

An estimated 18,800 calves were exported in 2010, up from 10,000 calves in 2009. The average calf price increased by 13 per cent to £132 per head and the revenue generated amounted to £2.8 million.

The number of store cattle sold outside Northern Ireland decreased by 13 per cent to 7,500 head and when combined with a 5 per cent increase in average producer price to £607 per head this generated a 10 per cent decrease in revenue to £4.5 million. The main market outlet for these store cattle is Great Britain, which accounted for 89 per cent of shipments.

Overall, the value of output of cattle and calves in 2010 (which deducts the value of imported cattle but includes breeding cattle exports and store exports) decreased by 4 per cent to £317 million.

Milk

In 2010, the annual average dairy cow population decreased by 1.6 per cent to 278,300 head. Average gross milk yield per cow increased during 2010 by 6 per cent, to 6,760 litres. This may be attributable in part to the better weather conditions experienced throughout the summer and autumn months.

The increase in milk yield and the decrease in cow numbers led to a 4 per cent rise in total output to 1.85 billion litres. The average gross milk price was 28 per cent higher than the 2009 price at 25.4 pence per litre. The rise in average milk price reflects the fact that Northern Ireland is dependant on global commodity markets where prices were high in 2010.

Overall, the value of output of milk rose in 2010, by £117 million or 33 per cent, to £470 million.

Sheep and lambs

Marketings of clean sheep and lambs decreased by 11 per cent in 2010 to 655,400 head. Average dressed carcase weight remained consistent with 2009 levels at 21.4 kg per head. As a result, the volume of clean sheepmeat produced fell by 11 per cent to 14,000 tonnes. Clean sheep and lamb producer prices increased by 13 per cent, to 375 pence per kg deadweight in 2010. The combined volume and price changes meant that the total market value of clean sheep and lambs decreased, by less than 1 per cent, to £53 million.

Marketings of culled ewes and rams decreased, by 14 per cent, to 107,300 head. There was a 15 per cent increase in the price received for these animals and average dressed carcase weights increased by 3 per cent. These changes resulted in a rise in the value of market receipts for culled ewes and rams by 2 per cent to £6.1 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 3 per cent, to £56 million.

Pigs

The number of clean pigs marketed during 2010 was 8.5 per cent higher than in 2009 at 943,300 head. Average dressed carcase weight fell by less than 1 per cent, to 82.2 kg. These changes resulted in a 7.8 per cent rise in the quantity of pigmeat produced, to 77,500 tonnes. Pig producer prices decreased by 4 per cent to 128 pence per kg deadweight. As a result, output from clean pig production was 3 per cent higher, at £99 million.

Marketings of cull sows and boars decreased, by 1 per cent, to 11,700 head. The average price per head of cull sows and boars decreased by 4 per cent. These changes resulted in the market returns for these animals decreasing by 5 per cent to £1.6 million in 2010.

Overall, the value of output from the pig sector increased, by 2 per cent, to £94 million (this figure includes deductions for the value of imported pigs and additions for the value of breeding and store pig exports).

Poultry

The total volume of poultrymeat production in 2010 increased by 3.2 per cent, to 264,900 tonnes liveweight. Broiler production was up 4.3 per cent, to 243,600 tonnes liveweight, while producer prices increased by 1 per cent to 72 pence per kg. Overall, the market value of broilers increased to £174 million, which was 5 per cent higher than in 2009. Broilers account for 82 per cent of the total market value of the poultry sector.

Turkey production decreased, by 16 per cent, to 10,100 tonnes liveweight.

The value of output from the poultry sector was 5.1 per cent higher than in 2009, at £213 million.

Eggs

Packing station throughput of graded eggs was estimated at 77 million dozen eggs in 2010. This was a rise of 23 per cent on 2009 levels. The proportion of throughput attributed to free range management systems increased from 31 per cent in 2009 to 42 per cent in 2010 with the remaining 58 per cent of eggs originating from intensively managed systems.

The average producer price of eggs decreased, by 6 per cent, to 64 pence per dozen. The overall value of egg output therefore increased, by 15 per cent, to £50 million (this figure includes eggs for processing, unrecorded sales for human consumption and duck eggs).

Potatoes

In 2010, the area of potatoes planted decreased by 3.8 per cent to 4,900 hectares. The average yield increased, by 5.3 per cent, to 42 tonnes per hectare. Consequently, the total quantity of potatoes harvested was 2 per cent higher at 207,200 tonnes.

Marketings of ware potatoes in 2010 were 4 per cent higher at 142,300 tonnes. There was a 3.9 per cent increase in sales in the first half of the 2010 calendar year and a 1 per cent increase during the second half of the year when compared with the equivalent periods in 2009. Sales in the first six months of 2010 were almost exclusively from the 2009 harvest which was higher than the previous year's harvest, while sales in the last six months of 2010 were mainly from the 2010 harvest.

In 2010, the volume of seed potato output (including home-saved seed) decreased, by 3.8 per cent, to 20,200 tonnes. In total for 2010, the volume of potato output (including ware, seed and stockfeed potatoes) was 186,900 tonnes. This was a 2.1 per cent increase on 2009 sales levels.

The average price of ware potatoes in 2010 was £131 per tonne, which was 1.3 per cent higher than in 2009. The average price of seed potatoes fell, by 1.8 per cent, to £173 per tonne. The total value of potato output increased in 2010, by 4.1 per cent, to £23 million.

Cereals

In 2010, spring barley yields were up by 4.9 per cent, while winter barley yields were up by 9.3 per cent. The area of spring barley decreased by 19 per cent to 17,600 hectares, while winter barley increased by 32 per cent to 6,800 hectares. As a consequence, production of spring barley decreased by 19 per cent, while winter barley increased by 45 per cent. Overall, total barley production was broadly consistent with 2009 levels at 139,100 tonnes, whilst the total area of barley grown decreased by 9 per cent to 24,300 hectares.

The total volume of barley sold or used on-farm in 2010 increased, by 2.5 per cent, to 137,700 tonnes. The average producer price of barley increased, by 22 per cent, to £135 per tonne. These changes resulted in a 22 per cent increase in the value of barley output to £19 million.

In 2009, the area of wheat grown was 7.5 per cent higher than 2009 at 10,900 hectares and when coupled with a 13 per cent increase in yield, resulted in a 22 per cent increase in production to 89,100 tonnes.

The volume of wheat sold or used on-farm in 2010 decreased by 1 per cent to 81,100 tonnes, while the price of wheat increased by 26 per cent to £152 per tonne. These changes contributed to the value of wheat output increasing by 54 per cent to £13.7 million.

The area of oats grown rose by 13 per cent to 2,300 hectares and when coupled with a 7 per cent increase in yield, resulted in a 22 per cent increase in production to 13,500. The average producer price of oats was 17 per cent higher at £140 per tonne, resulting in the value of output rising by 44 per cent, to £1.9 million.

Horticulture

The total value of horticultural output in 2010 increased by 3.5 per cent to £52 million. Returns from the sale of fruit (mainly apples) rose by 56 per cent to £7 million. Apple production rose by 11 per cent to 42,000 tonnes while prices decreased by 10 per cent. Overall, the output value of apples increased by 58 per cent. The value of output from mushrooms decreased by 1 per cent to £20 million, while receipts from the sale of vegetables decreased by 8 per cent to £13.5 million. The output value of ornamental and hardy nursery stock increased by 5 per cent to £12.1 million.

Feedstuffs

The total volume of all compound feedstuffs purchased during 2010 was broadly similar to 2009 levels at 1.92 million tonnes. Within this total, the purchased volumes of all cattle (and calf) compounds were broadly similar to 2009 levels, while there was a 1.8 per cent increase in purchases of dairy compounds and a 9.4 per cent decrease in beef cattle compounds. The volume of sheep compounds purchased increased by 3 per cent while purchases of pig compound also increased by 3 per cent. Total purchases of poultry compounds increased in 2010 by 1.3 per cent.

Inputs of straights (including home-fed cereals) decreased by 3.8 per cent in 2010 to 390,700 tonnes. In total, the volume of all feed purchased was 1.3 per cent lower than 2009 levels at 2.3 million tonnes. The average price of feedstuffs (compounds and home-fed cereals) increased, by 5.5 per cent, to £238 per tonne in 2010. The higher prices reflect increases in grain costs since the Summer of 2010. Overall, the cost of purchased feedstuffs increased by 3.4 per cent to £554 million.

Fertilisers and lime

The quantity of fertilisers purchased in 2010 increased by 42 per cent to 303,500 tonnes and the average price fell by 2.5 per cent to £238 per tonne. In volume terms, 47 per cent of total fertiliser sales were straights, while 53 per cent were compounds.

As a result of the volume increases, the total value of fertiliser purchases increased, by 38 per cent, to £72 million.

Total expenditure on lime fell by 9 per cent to £1 million. The quantity purchased decreased by 13 per cent, while price increased by 6 per cent.

Marketing expenses

Total marketing expenses in 2010 were 3 per cent lower than 2009 levels at £32.5 million. Cattle marketing expenses were £19 million, while sheep expenses were £2.8 million. Marketing expenses for milk were £7.1 million, while those for pigs were £3.3 million.

Machinery expenses

In 2010, machinery expenses increased, by 8 per cent, to £135 million. This increase was driven mainly by an 11 per cent rise in fuel and oil expenditure which was accompanied by a 6 per cent increase in machinery repair costs.

Interest Total borrowing for farming purposes decreased by 2.5 per cent in 2010. The average cost of borrowing is estimated to have remained broadly consistent with 2009 levels at 4.5 per cent. As a result, the total interest bill declined by 5 per cent to £39 million.

Labour In 2010, the volume of paid labour input (excluding labour used on capital projects) was broadly similar to 2009 levels, at 7.6 million hours, while paid labour costs decreased, by 2.5 per cent, to £55 million. This was due largely to a 1.4 per cent decrease in average full time earnings (£ per hour).

Contact: Jenny Gilmour, *Tel. (028-) 90 524927,*
E-mail. Jennifer.Gilmour@dardni.gsi.gov.uk

Table 2.19 Output of cattle and calves

	2005	2006	2007	2008	2009	2010 (provisional)
Steers, heifers and young bulls						
Sales (inc. OTMS) ('000 head)	394.0	367.7	388.8	339.3	342.6	352.2
Average producer price (p per kg dwt)[1,2]	178.3	192.2	192.6	248.3	261.4	255.3
Average dressed carcase weight (kg)[2,3]	329.8	327.3	333.6	331.0	330.6	329.5
Quantity of output ('000 tonnes)[2,3]	129.9	120.3	129.7	112.3	113.3	116.0
Value of output (inc. OTMS) (£m)	231.6	231.3	249.8	278.9	296.1	296.3
Cows and bulls						
Sales (inc. OTMS and OCDS) ('000 head)	114.4	86.2	97.3	104.3	91.2	92.1
Average producer price (p per kg dwt)[1,2]	95.2	139.8	143.2	188.9	196.8	195.2
Average dressed carcase weight (kg)[2,3]	244.1	312.8	322.5	311.1	307.4	316.1
Quantity of output ('000 tonnes)[2,3]	27.9	19.9	25.2	26.4	28.0	29.1
Value of output (inc. OTMS and OCDS) (£m)	26.6	33.4	40.4	54.3	55.2	56.9
Calves						
Sales ('000 head)	2.0	17.4	33.2	16.0	10.4	21.5
Average producer price (£ per head)[1]	68	93	94	117	117	132
Value of output (£m)	0.1	1.6	3.1	1.9	1.2	2.8
Store cattle sold outside Northern Ireland						
Marketings ('000 head)	8.1	5.9	6.8	8.0	8.6	7.5
Average producer price (£ per head)[1]	414	434	439	533	580	607
Value of output (£m)	3.3	2.6	3.0	4.3	5.0	4.5
Breeding cattle sold outside Northern Ireland						
Marketings ('000 head)	1.3	1.7	1.8	1.5	1.5	1.0
Average producer price (£ per head)	568	590	774	1,091	959	1,140
Value of output (£m)	1.8	1.0	1.4	1.6	1.4	1.1
***less* Imported cattle**						
Marketings ('000 head)	30.3	28.9	31.4	23.1	47.1	63.8
Average producer price (£ per head)	528	528	550	682	629	649
Value of output (£m)	16.0	15.2	17.3	15.8	29.6	41.4
Total Market Value (£m)	**246.5**	**254.6**	**280.3**	**325.2**	**329.3**	**320.2**
Other receipts (£m)	-	-	-	-	-	-
Stock change due to volume (£m)	-3.2	-16.0	-11.1	-1.7	+0.3	-2.7
Total value of output (£m)	**243.3**	**238.6**	**269.2**	**323.4**	**329.6**	**317.5**
Net receipts from non-food outlets (included above)						
Over Thirty Months Scheme (£m)	26.0	2.2	-	-	-	-
Older Cattle Disposal Scheme (£m)	-	5.5	4.2	4.5	-	-

1. Average realised return gross of marketing expenses for cattle for human consumption and for destruction under the Over Thirty Months Scheme. Excludes animals to the Older Cattle Disposal Scheme.
2. See note 3 Table 2.6.
3. Including animals sold under the Over Thirty Months Scheme, but excluding animals under the Older Cattle Disposal Scheme.

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

per cent

	2005	2006	2007	2008	2009	2010 (provisional)
Cows and bulls	23	19	20	23	21	20
Steers and heifers originating from:						
- the dairy herd;	33	36	35	33	36	36
- the beef herd;	36	40	39	38	38	35
- calves and stores imported from the Republic of Ireland or shipped from Great Britain	9	6	5	6	5	10
Total[2]	**100**	**100**	**100**	**100**	**100**	**100**
Total number marketed ('000 head)	**508**	**454**	**486**	**444**	**434**	**441**

1. Includes cattle slaughtered under the Over Thirty Months Scheme, Older Cattle Disposal Scheme and the BSE Selective Cull.
2. Individual items may not add to 100 due to roundings.

Table 2.21 Output of milk

	2005	2006	2007	2008	2009	2010 (provisional)
Annual average number of dairy cows ('000 head)	284.0	284.6	287.1	288.6	282.8	278.3
Average gross yield per cow (to nearest 10 litres per annum)[1]	6,720	6,830	6,810	6,710	6,382	6,760
Total output of milk for human consumption (million litres)	1,870	1,909	1,921	1,906	1,775	1,852
of which:						
sales off farms	1,866	1,905	1,918	1,903	1,772	1,849
used in farm households	4	4	4	3	3	2
Average producer price (pence per litre)						
Gross price[2]	18.31	17.15	22.18	23.32	19.88	25.40
Net price[3]	17.88	16.75	21.78	22.91	19.48	25.02
Market Value (£m)	**343.4**	**328.4**	**427.3**	**445.0**	**353.8**	**470.4**
Other receipts (£m)	-	-	-	-	-	-
Value of output (£m)[2,4]	**343.4**	**328.4**	**427.3**	**445.0**	**353.8**	**470.4**

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.
4. See note 5 Table 2.19.

Table 2.22 Output of sheep

	2005	2006	2007	2008	2009	2010 (provisional)
Marketings ('000 head)[1]						
Finished sheep and lambs	827.7	884.8	830.2	724.4	733.1	655.4
Culled ewes and rams	128.5	166.1	126.4	137.8	125.0	107.3
Average price (p per kg deadweight)[2]						
Finished sheep and lambs	235.9	244.6	243.1	291.4	332.2	374.6
Average dressed carcase weight (kg)						
Finished sheep and lambs	21.5	21.4	21.4	21.0	21.4	21.4
Quantity of Output ('000 tonnes)						
Finished sheep and lambs	17.8	18.9	17.7	15.2	15.7	14.0
Culled ewes and rams	3.4	4.4	3.4	3.6	3.4	3.0
Market Value (£m)[3]	**42.8**	**48.2**	**44.6**	**46.3**	**57.1**	**56.5**
Other receipts (£m)	-	-	-	-	-	-
Stock change due to volume (£m)	+0.8	+3.6	-5.5	+3.5	+0.4	-0.9
Value of output (£m)	**43.7**	**51.8**	**39.1**	**49.9**	**57.5**	**55.6**

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

	2005	2006	2007	2008	2009	2010 (provisional)
Marketings ('000 head)[1]						
Finished clean pigs	827.1	813.1	880.0	855.5	869.2	943.3
Culled sows and boars	12.3	12.6	12.2	10.6	11.8	11.7
Average price (p per kg deadweight)[2]						
Finished clean pigs	96.24	98.94	98.79	116.10	133.44	127.76
Culled sows and boars	53.18	53.20	51.71	94.54	97.44	96.87
Average dressed carcase weight (kg)						
Finished clean pigs	79.4	80.1	79.4	80.1	82.7	82.2
Quantity of output ('000 tonnes)						
Finished clean pigs	65.7	65.1	69.8	68.5	71.9	77.5
Culled sows and boars	1.9	1.9	1.8	1.6	1.8	1.6
Market Value (£m)[3]	**61.6**	**62.5**	**65.2**	**76.2**	**91.9**	**93.7**
Stock change due to volume (£m)	+0.2	0.0	+0.8	+0.7	-0.2	+0.1
Value of output (£m)	**61.7**	**62.4**	**66.0**	**76.8**	**91.7**	**93.8**

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

	2005	2006	2007	2008	2009	2010 (provisional)
Poultrymeat production ('000 tonnes liveweight)						
All poultrymeat (including broilers)	228.9	235.3	247.4	242.4	256.6	264.9
Broilers	206.2	214.1	226.6	221.7	233.8	243.6
Average producer price (p per kg liveweight)						
All poultrymeat (including broilers)	49.7	49.6	51.6	65.6	69.9	70.2
Broilers	50.7	50.8	53.1	66.6	70.8	71.5
Market value						
All poultry (£m)	136.6	138.2	150.3	182.9	201.7	211.9
of which broilers	104.5	108.8	120.3	147.6	165.6	174.2
Stock change due to volume (£m)	-0.7	+0.5	-1.0	-0.6	+0.8	+0.9
Value of Output (£m)[1]	**136.0**	**138.8**	**149.3**	**182.3**	**202.5**	**212.8**

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

	2005	2006	2007	2008	2009	2010 (provisional)
Graded packing station throughput (million dozen)	58.5	54.4	55.7	59.8	62.7	77.0
Average producer price (p per dozen)[1]	36.28	40.42	51.05	57.57	68.28	64.13
Value of output (£m)[2]	**21.7**	**22.5**	**29.0**	**35.2**	**43.8**	**50.2**

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

Table 2.26 Crop production

	2005	2006	2007	2008	2009	2010 (provisional)
						harvest years
Potatoes[1]						
Area ('000 hectares)	4.5	4.7	4.8	5.1	5.1	4.9
Harvestable yield (tonnes per hectare)	38.4	41.9	39.8	36.5	39.9	42.0
Production ('000 tonnes)	174.4	199.0	189.4	185.9	203.3	207.2
of which:						
saleable potatoes	156.1	172.4	163.9	160.7	173.8	181.2
chats[2] and waste	18.3	26.6	25.6	25.2	29.6	26.0
Barley[3,4]						
Area ('000 hectares)	25.7	22.8	22.8	25.7	26.7	24.3
Yield (tonnes per hectare)	4.57	5.03	5.23	5.11	5.22	5.72
Production ('000 tonnes)	117.6	114.8	119.3	131.2	139.7	139.1
Wheat[4]						
Area ('000 hectares)	8.4	8.7	9.2	12.1	10.1	10.9
Yield (tonnes per hectare)	7.37	7.58	7.41	7.92	7.23	8.18
Production ('000 tonnes)	62.0	66.1	67.9	95.8	73.2	89.1
Oats[3,4]						
Area ('000 hectares)	1.9	1.9	2.0	2.4	2.1	2.3
Yield (tonnes per hectare)	5.03	5.87	5.19	4.50	5.39	5.78
Production ('000 tonnes)	9.8	10.9	10.5	10.9	11.1	13.5
Oilseed rape[5]						
Area ('000 hectares)	0.3	0.5	0.4	0.4	0.6	0.4
Yield (tonnes per hectare)	3.20	3.30	3.10	3.30	3.40	3.50
Production ('000 tonnes)	1.1	1.6	1.2	1.5	2.1	1.6
Hay						
Area ('000 hectares)	14.6	14.1	11.0	12.4	11.4	13.0
Yield (tonnes per hectare)	6.86	7.56	8.03	8.36	9.54	9.50
Production ('000 tonnes)	99.9	106.8	88.6	104.1	108.9	124.0
Grass silage						
Area ('000 hectares)	304.2	270.3	271.9	275.5	287.5	306.9
Yield (tonnes per hectare)	26.03	30.80	31.52	30.76	31.15	30.0
Production ('000 tonnes)	7,920.1	8,325.9	8,571.2	8,476.3	8,957.0	9,191.0

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. Area and production estimates include industrial-use oilseed rape grown on set-aside land. Yield and production estimates are standardised to 9% moisture content.

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

	2005	2006	2007	2008	2009	2010 (provisional)
POTATOES[2]						
Quantity of output ('000 tonnes)						
Ware	133.4	131.3	139.2	126.3	137.1	142.3
Seed	20.2	18.4	20.3	22.7	21.0	20.2
Stockfeed	19.5	21.2	24.2	22.8	25.0	24.5
Total	**173.1**	**170.9**	**183.7**	**171.8**	**183.1**	**186.9**
Average producer price (£ per tonne)						
Ware	91.50	120.53	135.84	130.19	128.82	130.51
Seed	95.13	125.33	172.12	170.97	175.74	172.64
Market Value (£m)						
Ware	12.2	15.8	18.9	16.4	17.7	18.6
Seed	1.9	2.3	3.5	3.9	3.7	3.5
Stockfeed	0.2	0.2	0.4	0.4	0.3	0.4
Total[3]	**14.2**	**18.3**	**22.7**	**20.6**	**21.7**	**22.4**
Stock change due to volume (£m)	-1.0	+1.3	-1.0	-0.1	+0.3	+0.5
Value of output (£m)	**13.3**	**19.6**	**21.7**	**20.5**	**21.9**	**22.8**
BARLEY[4]						
Quantity of output ('000 tonnes)	127.9	115.4	117.7	126.7	134.4	137.7
Average producer price (£ per tonne)	83.14	94.95	141.84	145.38	110.77	135.13
Market Value (£m)	10.6	11.0	16.7	18.4	14.9	18.6
Other Receipts (£m)	-	-	-	-	-	-
Stock change due to volume (£m)	-0.8	-0.1	+0.3	+0.6	+0.6	+0.2
Value of output (£m)	**9.8**	**10.9**	**17.0**	**19.0**	**15.4**	**18.8**
WHEAT[4]						
Quantity of output ('000 tonnes)	64.9	67.1	67.4	83.9	80.2	81.1
Average producer price (£ per tonne)	85.53	99.65	148.01	144.75	120.71	151.73
Market Value (£m)	5.5	6.7	10.0	12.1	9.7	12.3
Other Receipts (£m)	-	-	-	-	-	-
Stock change due to volume (£m)	-0.3	-0.1	+0.1	+1.5	-0.8	1.4
Value of output (£m)	**5.3**	**6.6**	**10.1**	**13.7**	**8.9**	**13.7**

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

	2005	2006	2007	2008	2009	2010 (provisional)
APPLES[1]						
Quantity of output ('000 tonnes)	44.2	40.3	69.3	54.8	37.8	42.0
Average producer price (£ per tonne)	122	168	171	148	152	137
Market value (£m)	5.4	6.8	11.8	8.1	5.8	5.7
Stock change due to volume (£m)	-0.9	+1.2	-0.9	+0.9	-1.7	0.6
Value of Output (£m)	**4.4**	**8.0**	**11.0**	**8.9**	**4.0**	**6.3**
MUSHROOMS						
Quantity of output ('000 tonnes)	19.6	17.0	18.5	18.2	16.4	16.3
Average producer price (£ per tonne)	1,232	1,144	1,243	1,232	1,213	1,210
Value of output (£m)	**24.2**	**19.4**	**23.0**	**22.4**	**19.9**	**19.7**

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)

	2005	2006	2007	2008	2009	2010 (provisional)
FEEDSTUFFS[1]						
Quantity purchased ('000 tonnes concentrate equivalent)	2,188	2,236	2,204	2,255	2,368	2,338
Average cost (£ per tonne concentrate equivalent)	166	165	196	232	225	238
Value of feed consumed (£m)	**362.6**	**368.2**	**430.7**	**522.0**	**535.9**	**553.9**
of which:						
stock change due to volume	-0.2	+0.4	-0.8	-0.2	+2.2	-1.9
FERTILISERS						
Quantity purchased ('000 tonnes product)	348	320	300	285	214	302
Nutrient content ('000 tonnes)	125	114	102	93	69	101
of which:						
Nitrogen	88	80	76	74	56	80
Phosphate	16	14	9	6	5	7
Potash	21	19	17	13	8	13
Average cost (£ per tonne of nutrient)	416	463	476	889	756	717
Value of purchases (£m)	**51.8**	**52.6**	**48.5**	**83.1**	**52.2**	**72.1**
LIME						
Quantity purchased ('000 tonnes)	92	90	73	83	103	90
Average cost (£ per tonne)	15.00	16.00	9.70	9.78	10.18	10.84
Value of purchases (£m)	**1.4**	**1.4**	**0.7**	**0.8**	**1.1**	**1.0**
MARKETING EXPENSES[2]						
Cattle	18.6	18.8	18.9	19.3	20.1	19.4
Sheep	4.3	2.7	3.3	3.5	3.5	2.8
Pigs	1.7	1.8	2.0	2.7	2.8	3.3
Milk	7.9	7.7	7.8	7.8	7.1	7.1
Total	**32.6**	**31.0**	**31.9**	**33.4**	**33.5**	**32.5**
INTEREST						
Bank base lending rate (%)	4.7	4.6	5.5	4.7	0.6	0.5
Total interest charges (£m)[3]	**42.6**	**45.5**	**54.4**	**53.8**	**40.7**	**38.6**
LABOUR						
Average weekly hours of full-time paid male workers	41.99	40.74	41.74	39.90	40.64	39.65
Average earnings of full-time paid male workers (£ per hour)[4]	6.17	6.30	6.90	6.87	7.50	7.37
Average earnings of full-time paid male workers (£ per week)[4]	259.08	256.66	288.01	274.11	304.80	292.22
Volume of paid labour (million hours)[5]	8.32	7.88	7.74	7.60	7.58	7.57
Value of paid labour (£m)[5]	**52.7**	**52.3**	**54.5**	**54.7**	**56.9**	**55.4**

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.
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

Around 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 7 per cent is used for forestry (Table 3.1). The greater part of the total forested area (88,000 hectares) is managed by the Forest Service of the Department of Agriculture and Rural Development (see *Forest Service Annual Report, 2009/2010*[1]).

Most farmland in Northern Ireland is under grass. Only 4,133 farms (17 per cent) have arable or horticultural crops. These crops occupy 55,600 hectares and make up only 6 per cent of the total area farmed. Barley (24,300 hectares) is the main crop grown followed by wheat with 10,900 hectares. In 2010, the cropped area also included approximately 3,000 hectares of horticultural crops, mainly apple orchards (1,500 hectares) and vegetables (1,300 hectares). The total area of cereal grown was broadly similar to that in 2009. After the year 2000 the area of cereals fell for a number of years to a low of 33,600 hectares in 2006 before recovering in recent years. Over the 10 year period since 2000 the area of land in potatoes decreased by 27 per cent.

Grazing livestock

All but 6 per cent of Northern Ireland farms have cattle or sheep. In 2010, cattle were present on 20,290 farms (83 per cent), sheep on 8,542 farms (35 per cent) and cattle and/or sheep on 22,891 farms (94 per cent).

The total number of cattle, recorded at 1.6 million in the June 2010 census, has fallen by 4 per cent in the ten years since 2000. At June 2010, there were 281,000 dairy cows, one per cent lower than in 2009. There were 258,000 beef cows, approximately the same as 2009. Both beef cow and total cattle populations peaked in 1998 and are now below the levels in that year by 25 per cent and 9 per cent, respectively.

In 2010, the sheep breeding flock was 2 per cent smaller than in 2009 with 875,900 ewes. Ewe numbers are at their lowest level since 1984. Including lambs and other sheep the entire flock totalled 1.85 million in 2010.

Intensive livestock

In Northern Ireland, pigs and/or poultry (for commercial purposes) are present on 5 per cent of farms.

1 Available on the DARD website at http://www.forestserviceni.gov.uk/index/publications/annual-reports.htm

The number of pigs in Northern Ireland at June 2010 was estimated at 424,600, 2 per cent less than in the previous June while the number of farms with pig herds increased by 9 per cent to 561. There was an increase in sow numbers of 1 per cent between 2009 and 2010 to 38,500.

The size of the Northern Ireland pig herd contracted significantly between 1997 and 2001 when pig numbers fell by 45 per cent.

In June 2010, the Northern Ireland poultry flock was recorded at 16.5 million birds, 2 per cent less than in 2009. The number of laying birds (2.1 million) fell slightly in 2010 while the numbers of broilers (11.9 million) increased from 2009.

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). Crops are grown mainly on **lowland farms**. Crops occupy 14 per cent of land on lowland farms compared with 2 per cent in the case of LFA farms. There are also significant differences in the patterns of livestock farming. Beef cows (198,000) predominate on **LFA farms**, where they are more important than dairy cows (139,000), whereas, on **lowland farms**, there were 60,000 beef cows and 142,000 dairy cows in 2010. **LFA farms** account for 36 and 62 per cent of the Northern Ireland's pigs and poultry, respectively.

Contact: Paul Caskie, Tel. (028-) 905 24427,
E-mail. Paul.Caskie@dardni.gov.uk

Table 3.1 Land use, 2010

thousand hectares

	Crops	Grass and rough grazing	Woodland	Other land	Total land area
Farms	56	920	10	8	**994**
Common grazing	-	37	-	-	**37**
NI Forest Service[1]	-	-	61	14	**75**
Other areas	-	-	17	228	**245**
All land[2]	**56**	**957**	**88**	**250**	**1,351**

1. Excludes 1,600 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 2005 - 2010

thousand hectares

	2005	2006	2007	2008	2009	2010
Oats	1.9	1.9	2.0	2.4	2.1	2.3
Wheat	8.4	8.7	9.2	12.1	10.1	10.9
Barley: Winter	4.0	4.6	4.7	6.1	5.1	6.8
Spring	21.7	18.2	18.1	19.5	21.6	17.6
Mixed corn	0.2	0.1	0.2	0.2	0.3	0.2
Potatoes	4.5	4.7	4.8	5.1	5.1	4.9
Arable crop silage	3.2	3.3	3.3	3.2	3.5	3.9
Other field crops	4.5	5.2	6.0	6.6	6.9	6.1
Total agricultural crops	**48.5**	**46.8**	**48.2**	**55.4**	**54.8**	**52.6**
Fruit	1.5	1.5	1.5	1.5	1.5	1.5
Vegetables	1.4	1.4	1.3	1.4	1.4	1.3
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**	**3.0**	**2.9**
Grass: Under 5 years old	135.6	126.5	122.1	117.2	120.8	118.4
5 years old and over	675.8	677.2	671.9	672.4	669.9	661.6
Total grass	**811.4**	**803.7**	**794.0**	**789.6**	**790.7**	**780.0**
Total crops and grass	**862.9**	**853.5**	**845.2**	**848.0**	**848.4**	**835.5**
Rough grazing[1]	148.6	151.3	146.5	147.1	141.9	140.5
Woods and plantations	8.6	9.6	9.9	9.9	10.3	10.2
Other land[2]	9.4	14.1	12.9	12.4	7.4	7.8
Total area of farms	**1,029.5**	**1,028.5**	**1,014.5**	**1,017.4**	**1,008.0**	**994.0**

1. Excludes common rough grazing (36,836 ha).
2. Includes set aside and land not used for agriculture.

Table 3.3 Livestock numbers, June 2005 - 2010

thousand head

	2005	2006	2007	2008	2009	2010
CATTLE[1]						
Dairy cows	**287.1**	**284.7**	**286.1**	**289.2**	**284.7**	**281.0**
Dairy heifers in calf	64.2	66.5	67.8	64.3	62.5	61.9
Beef cows	**280.6**	**276.7**	**272.6**	**265.7**	**256.8**	**257.6**
Beef heifers in calf	42.4	41.8	36.7	39.7	37.6	38.4
Total cows	**567.7**	**561.5**	**558.7**	**554.9**	**541.5**	**538.7**
Total heifers in calf	**106.7**	**108.3**	**104.5**	**104.0**	**100.1**	**100.3**
Bulls for service	19.7	19.7	17.6	19.6	18.6	18.4
Other cattle						
Over 2 years	175.9	170.5	160.8	151.5	132.0	133.6
1-2 years	374.1	368.3	362.7	333.5	348.6	354.2
Under 1 year	468.7	460.9	439.2	459.0	458.4	459.1
Total cattle	**1,712.7**	**1,689.3**	**1,643.5**	**1,622.5**	**1,599.0**	**1,604.4**
SHEEP						
Breeding ewes	1,027.3	991.1	957.3	935.4	892.4	875.9
Other sheep	1,117.8	1,079.4	1,066.7	1,038.2	1,004.3	971.8
Total sheep	**2,145.1**	**2,070.5**	**2,024.0**	**1,973.6**	**1,896.7**	**1,847.7**
PIGS						
Sows and gilts	36.7	37.4	37.0	35.5	38.2	38.5
Other pigs	368.4	349.2	373.5	366.9	395.4	386.1
Total pigs	**405.1**	**386.6**	**410.5**	**402.4**	**433.5**	**424.6**
POULTRY[1]						
Laying birds	2,319.2	2,187.7	2,394.0	2,398.5	2,315.7	2,099.4
Growing pullets	669.5	743.1	1,039.8	1,174.3	999.1	1,017.3
Breeding flock	1,634.5	1,594.8	1,538.0	1,205.2	1,573.2	1,078.2
Table chickens	12,525.7	13,367.1	11,861.3	11,543.5	11,418.3	11,915.1
Total ordinary fowl	**17,148.8**	**17,892.7**	**16,833.0**	**16,321.4**	**16,306.3**	**16,109.9**
Other poultry	465.4	518.3	451.9	809.4	556.4	421.2
Total poultry	**17,614.3**	**18,411.0**	**17,284.9**	**17,130.9**	**16.862.7**	**16,531.1**
HORSES & PONIES	**9.3**	**10.3**	**10.8**	**11.8**	**12.2**	**12.5**
GOATS	**2.3**	**2.5**	**2.5**	**2.8**	**2.7**	**2.9**

1. From 2005 onwards, cattle figures were derived from APHIS.

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

Table 3.4 Areas of crops, grass, rough grazing and other land by Less Favoured Area (LFA) category[1] of farm, June 2010

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	6	8	29	22
Potatoes	0	1	1	4	27
Other agricultural crops	1	2	3	7	30
Horticultural crops	0	1	1	2	21
Total crops	**4**	**10**	**13**	**42**	**24**
Grass: Under 5 years old	39	33	72	46	61
5 years and over	277	190	467	195	71
Total grass	**316**	**223**	**539**	**241**	**69**
Rough grazing[2]	126	9	135	5	96
Woods/other land	7	5	12	6	68
Total area	**453**	**247**	**700**	**294**	**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 2010

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	47	92	139	142	50
Beef cows	125	72	198	60	77
Heifers in calf	23	32	55	45	55
Bulls for service	6	6	11	7	61
Other cattle					
Over 2 years	34	43	78	56	58
1-2 years	91	115	206	148	58
Under 1 year	146	143	289	170	63
Total cattle	**472**	**504**	**976**	**629**	**61**
SHEEP					
Breeding ewes	513	195	708	168	81
Other sheep	551	227	778	193	80
Total sheep	**1,065**	**422**	**1,486**	**361**	**80**
PIGS					
Sows and gilts	4	10	14	24	37
Other pigs	48	90	138	248	36
Total pigs	**53**	**100**	**152**	**272**	**36**
POULTRY					
Laying birds	965	661	1,626	473	77
Table fowl	1,806	5,259	7,065	4,850	59
Other poultry	599	1,039	1,638	879	65
Total poultry	**3,371**	**6,958**	**10,329**	**6,202**	**62**
HORSES AND PONIES	**3**	**3**	**6**	**6**	**50**
GOATS	**1**	**1**	**2**	**1**	**68**

1. See Note 1, Table 3.4.

4. FARM STRUCTURE

Methodological Notes

In the 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.

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 2010 census, 24,471, was 793 fewer than in 2009. This is a net change, with some new businesses being created and others merging or ceasing to be active. The downward trend in the number of farms is on average 2 per cent per year from 2005 to 2010 and 2 per cent per year over the past 10 years.

Almost a quarter of all farms have less than 10 hectares of crops and grass while over 1,300 farms (5 per cent) have 100 hectares or more; these 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 Gross Margins (SGMs) 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 SGM. 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 will continue to be based on the SGM approach, from 2004 onwards, farm size will reflect Standard Labour Requirements (SLRs) on farms (see appendix, page 82). 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.

The majority of farm businesses in Northern Ireland, 76 per cent in 2010, are classified as **very small**. In 2010, there were 18,617 farms in this category (Table 4.3) which was 3.6 per cent lower than the 2009 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 SGM but account for 48 per cent of the farmed area (Table 4.15). The main activities of these farms are cattle and sheep rearing. In 2010, 59 per cent of beef cows and half of total sheep were to be found on very small farms. Around 30,000 persons are engaged in the work of these farms (Table 4.13).

There were 3,085 **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, with 28 per cent of poultry and 27 per cent of total sheep; they cover 21 per cent of the agricultural area and involve 20 per cent of the full time agricultural labour force (Table 4.15).

The 1,276 **medium** and 1,493 **large** farms (together representing 11 per cent of all farms) contribute 56 per cent of the total SGM from under a third (31 per cent) of the land area (Table 4.15). These farms dominant the dairy, pigs and poultry layer sectors with 79, 85 and 68 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 56 and 44 per cent, respectively (Table 4.5).

Farm type

Eighty-eight per cent of Northern Ireland farms derive two-thirds or more of their total SGM from cattle and/or sheep (Table 4.6), including 13 per cent classified as **dairy** farms and 75 per cent as **cattle and sheep**. Relatively few farms depend predominantly on cropping with 548 (2 per cent) classified as **cereal** farms, 267 (1 per cent) as **general cropping** and 289 (1 per cent) as **horticulture**. These exclude specialist mushroom growers who, for statistical purposes, were included along with specialists in horses or goats, in the **other types** category (593 farms in total). Specialist **pigs and poultry** farms (518) and **mixed** farms (788) make up 2 and 3 per cent of the total, respectively.

Farm tenure

Most farms in Northern Ireland include some rented land, 6 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

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.

entirely owner-occupied (Table 4.9). Much of the rented land is taken under 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 2010, 3,647 farms (15 per cent) had dairy cows, 14,927 (61 per cent) had beef cows and 20,290 (83 per cent) had cattle of some type. The average number of dairy cows per herd, 77, was 2 more than in 2009[2]. It compares with an average herd size for beef breeding herds of 17 cows. Fifty-six per cent of dairy cows are in herds of 100 or more cows, compared with 8 per cent of beef cows.

Some 8,348 farms had breeding sheep, with an average of 105 ewes per flock. There were relatively few large flocks in Northern Ireland with only 28 farms having a flock size of 1,000 ewes or more.

Pigs were present on 561 farms in 2010. Most of the pig herds (420 in 2010) had sows, averaging 92 sows per herd. Of the farms with sows, over half, (214) had fewer than 10 sows and 22 per cent (92) had 100 or more.

Figures for poultry were taken from the Northern Ireland Bird Register Update in 2010, with only commercial producers considered. Of the 128 business with laying hens four-fifths had flocks over 1,000 birds. Seventeen businesses farmed over thirty thousand birds with these farms accounting for over half of the total laying birds. A similar situation exists for broiler flocks, where 57 per cent of the birds were in 66 (22 per cent) farm businesses (Table 4.21).

In 2010, cereals were grown on 2,837 farms, 12 per cent of all farms in Northern Ireland. The average area of a cereal enterprise was 13 hectares (Table 4.24). While approximately two-fifths (1,149) of the farms with cereals had less than 5 hectares, the 134 farms (5 per cent of cereal farms) which grew 50 hectares or more accounted for a third of cereal area grown.

Some 689 farms, 3 per cent of total farms, grew potatoes in 2010. Of this number, 123 grew 10 hectares or more, with these farms accounting for approximately three quarters of the total area of potatoes grown (Table 4.25).

Contact: Paul Caskie, Tel. (028-) 905 24427,
E-mail. Paul.Caskie@dardni.gov.uk

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 2010

Size group	By crops and grass area		By total area	
(hectares)	Farms	Hectares	Farms	Hectares
Nil	578	-	358	-
0.1 - 9.9	5,045	29,226	4,429	25,885
10.0 - 19.9	5,499	80,197	5,128	75,239
20.0 - 29.9	3,917	95,819	3,816	93,806
30.0 - 49.9	4,396	169,701	4,600	178,286
50.0 - 99.9	3,704	252,787	4,251	292,025
100.0 - 199.9	1,146	149,811	1,525	203,108
200.0 +	186	57,980	364	125,625
Total	**24,471**	**835,521**	**24,471**	**993,974**

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 2005 - 2010

	2005	2006	2007	2008	2009	2010
Number of farms	27,064	26,739	26,146	25,952	25,264	24,471
Average area per farm (ha):						
Crops and grass	31.9	31.9	32.3	32.7	33.6	34.1
Total area	38.0	38.5	38.8	39.2	39.9	40.6
Per cent of crops and grass area farmed in units of:						
(hectares)						
0.1 - 9.9	4.0	4.0	3.9	3.8	3.6	3.5
10.0 - 19.9	10.9	10.7	10.5	10.6	10.0	9.6
20.0 - 29.9	12.1	12.1	12.1	11.9	11.6	11.5
30.0 - 49.9	21.6	21.4	21.2	20.7	20.5	20.3
50.0 - 99.9	30.4	30.5	30.4	30.1	30.5	30.3
100.0 +	21.1	21.2	21.9	22.9	23.8	24.9
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 2010

number

Area of crops and grass farmed (hectares)	Business size[1]				
	Very small	Small	Medium	Large	All sizes
Under 10	5,357	141	54	71	5,623
10.0 - 19.9	5,266	147	49	37	5,499
20.0 - 29.9	3,540	289	45	43	3,917
30.0 - 49.9	3,123	976	210	87	4,396
50.0 - 99.9	1,240	1,236	679	549	3,704
100.0 +	91	296	239	706	1,332
Total	**18,617**	**3,085**	**1,276**	**1,493**	**24,471**

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

Table 4.4 Number of farms by business size, June 2005 - 2010

number

Business size[1]	2005	2006	2007	2008	2009	2010
Very small	20,468	20,319	19,990	19,984	19,321	18,617
Small	3,823	3,650	3,367	3,188	3,175	3,085
Medium	1,478	1,415	1,363	1,289	1,302	1,276
Large	1,295	1,355	1,426	1,491	1,466	1,493
Total	**27,064**	**26,739**	**26,146**	**25,952**	**25,264**	**24,471**

1. See Note 1, Table 4.3.

Table 4.5 Number of farms by business size and Less Favoured Area (LFA) category[1], June 2010

number

Business size[2]	Severely Disadvantaged Area (SDA)	Disadvantaged Area (DA)	Total LFA	Non LFA	LFA as % NI
Very small	8,182	5,610	13,792	4,825	74
Small	1,048	963	2,011	1,074	65
Medium	333	377	710	566	56
Large	238	426	664	829	44
Total	**9,801**	**7,376**	**17,177**	**7,294**	**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 2010

number

Business type[1]	Business size[1]				
	Very small	Small	Medium	Large	All sizes
Cereals	468	50	18	12	548
General cropping	161	39	24	43	267
Horticulture	131	55	28	75	289
Pigs & poultry	258	134	51	75	518
Dairy	503	967	731	993	3,194
Cattle & sheep (LFA)[2]	12,594	1,140	227	115	14,076
Cattle & sheep (lowland)[2]	3,568	475	97	58	4,198
Mixed	470	174	64	80	788
Others	464	51	36	42	593
All types	**18,617**	**3,085**	**1,276**	**1,493**	**24,471**

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 2005 - 2010

number

Business type[1]	2005	2006	2007	2008	2009	2010
Cereals	469	443	467	586	540	548
General cropping	224	230	231	245	242	267
Horticulture	306	301	284	297	288	289
Pigs & poultry	541	575	547	586	576	518
Dairy	4,058	3,761	3,619	3,457	3,363	3,194
Cattle & sheep (LFA)[2]	15,430	15,230	14,923	14,591	14,510	14,076
Cattle & sheep (lowland)[2]	4,619	4,629	4,497	4,355	4,359	4,198
Mixed	944	918	779	862	807	788
Others	473	652	799	973	579	593
All types	**27,064**	**26,739**	**26,146**	**25,952**	**25,264**	**24,471**

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 2010

number

Business type[2]	Severely Disadvantaged Area (SDA)	Disadvantaged Area (DA)	Total LFA	Non LFA	LFA as % NI
Cereals	32	89	121	427	22
General cropping	22	63	85	182	32
Horticulture	21	82	103	186	36
Pigs & poultry	141	177	318	200	61
Dairy	715	1,125	1,840	1,354	58
Cattle & sheep	8,647	5,429	14,076	4,198	77
Mixed	99	220	319	469	40
Others	124	191	315	278	53
All types	**9,801**	**7,376**	**17,177**	**7,294**	**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 2010

farms

Owned land as percentage of farmed area	Business size[1]				
	Very small	Small	Medium	Large	All sizes
All owner occupied	10,473	885	267	223	11,848
50-<100%	4,437	1,358	597	713	7,105
>0-<50%	2,391	738	387	526	4,042
None owner occupied	1,316	104	25	31	1,476
All farms	**18,617**	**3,085**	**1,276**	**1,493**	**24,471**

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

Table 4.10 Area of land by type of tenure, 2005 - 2010

hectares

	2005	2006	2007	2008	2009	2010
Owner-occupied	701,311	704,985	695,381	694,026	688,016	673,050
Rented	328,209	323,510	319,163	323,356	319,947	320,924
Total	**1,029,520**	**1,028,495**	**1,014,544**	**1,017,381**	**1,007,963**	**993,974**
Percentage of owned land	**68.1**	**68.5**	**68.5**	**68.2**	**68.3**	**67.7**
Common grazing	**29,400**[1]	**37,500**	**36,380**	**36,353**	**36,438**	**36,836**

1. 2004.

Table 4.11 Average conacre rents by type of use, 2004 - 2009

£/hectare

Use	2004	2005	2006	2007	2008	2009
Grass	198	180	174	184	193	188
Potatoes	433	453	567	586	686	623
Cereals	247	156	186	190	222	211
Rough grazing	53	45	44	46	41	34
All uses	**165**	**158**	**165**	**162**	**171**	**168**

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
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 2010

number of persons

Labour item	Business size[1]				
	Very small	Small	Medium	Large	All sizes
Farmers and partners					
Full time	8,751	3,334	1,648	2,232	15,965
Part time	12,492	711	175	218	13,596
Total	**21,243**	**4,045**	**1,823**	**2,450**	**29,561**
Spouses of farmers	**4,060**	**1,001**	**517**	**628**	**6,206**
Other workers					
Full time	826	456	337	1,490	3,109
Part time	1,879	604	285	419	3,187
Casual/seasonal	2,453	893	547	992	4,885
Total other workers	**5,158**	**1,953**	**1,169**	**2,901**	**11,181**
Total agricultural labour force	**30,461**	**6,999**	**3,509**	**5,979**	**46,948**

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 2010

number of persons

Labour item	Severely Disadvantaged Area (SDA)	Disadvantaged Area (DA)	Total LFA	Non LFA	LFA as % NI
Farmers and partners					
Full time	5,791	4,751	10,542	5,423	66
Part time	5,686	4,202	9,888	3,708	73
Total	**11,477**	**8,953**	**20,430**	**9,131**	**69**
Spouses of farmers	**2,272**	**1,802**	**4,074**	**2,132**	**66**
Other workers					
Full time	762	791	1,553	1,556	50
Part time	1,120	906	2,026	1,161	64
Casual/seasonal	1,543	1,408	2,951	1,934	60
Total other workers	**3,425**	**3,105**	**6,530**	**4,651**	**58**
Total agricultural labour force	**17,174**	**13,860**	**31,034**	**15,914**	**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 2010

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	15,019	572	*36*	2,780	345	*22*	1,159	223	*14*	1,332	464	*29*	20,290	1,604	*100*
Dairy cows	674	11	*4*	1,113	49	*17*	788	61	*22*	1,072	160	*57*	3,647	281	*100*
Beef cows	11,653	153	*59*	1,998	61	*24*	623	22	*8*	653	22	*9*	14,927	258	*100*
Slaughter cattle >1year	13,970	172	*42*	2,755	96	*23*	1,148	52	*13*	1,326	91	*22*	19,199	410	*100*
Sheep															
Total	6,444	932	*50*	1,332	496	*27*	425	201	*11*	341	220	*12*	8,542	1,848	*100*
Ewes	6,290	444	*51*	1,315	234	*27*	417	95	*11*	326	103	*12*	8,348	876	*100*
Pigs															
Total	312	27	*6*	90	35	*8*	65	54	*13*	94	309	*73*	561	425	*100*
Sows	215	2	*4*	66	3	*8*	54	4	*11*	85	29	*76*	420	39	*100*
Other pigs over 20 kg	148	19	*8*	66	21	*9*	50	35	*14*	84	173	*70*	348	248	*100*
Poultry															
Total	272	2,609	*16*	201	4,591	*28*	76	2,795	*17*	108	6,536	*40*	657	16,531	*100*
Layers	43	140	*7*	48	523	*25*	9	113	*5*	28	1,323	*63*	128	2,099	*100*
Crops															
Oats	208	1	*30*	87	1	*23*	46	0	*20*	70	1	*28*	411	2	*100*
Wheat	274	2	*20*	137	2	*16*	112	2	*15*	254	5	*49*	777	11	*100*
Barley	1,188	8	*33*	513	5	*22*	274	4	*15*	338	7	*29*	2,313	24	*100*
Potatoes	386	1	*13*	143	1	*16*	52	1	*13*	108	3	*58*	689	5	*100*
Crops & grass	18,134	399	*48*	3,041	172	*21*	1,255	95	*11*	1,463	170	*20*	23,893	836	*100*
Rough grazing	4,207	67	*48*	860	35	*25*	306	17	*12*	272	22	*15*	5,645	140	*100*
Total area	18,617	474	*48*	3,085	210	*21*	1,276	113	*11*	1,493	197	*20*	24,471	994	*100*
Labour															
Full-time labour force[2]	8,467	11	*51*	2,862	4	*20*	1,269	2	*10*	1,485	4	*19*	14,083	21	*100*
Output															
SGM[3]	18,617	173	*24*	3,085	141	*20*	1,276	111	*16*	1,493	284	*40*	24,471	709	*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 2010[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	265	1,727	7.3	0.6	6,770	31,007	45.4	12.0
10 - 14	148	1,752	4.1	0.6	2,028	24,009	13.6	9.3
15 - 19	163	2,770	4.5	1.0	1,737	29,282	11.6	11.4
20 - 29	271	6,711	7.4	2.4	1,978	47,212	13.3	18.3
30 - 39	306	10,649	8.4	3.8	992	33,669	6.6	13.1
40 - 49	288	12,801	7.9	4.6	556	24,453	3.7	9.5
50 - 59	292	15,930	8.0	5.7	296	15,944	2.0	6.2
60 - 69	275	17,709	7.5	6.3	142	9,108	1.0	3.5
70 - 99	656	54,550	18.0	19.4	290	23,451	1.9	9,1
100 & Over	983	156,444	27.0	55.7	138	19,513	0.9	7.6
Total 2010	**3,647**	**281,043**	**100.0**	**100.0**	**14,927**	**257,648**	**100.0**	**100.0**
Total 2009	***3,802***	***284,698***			***16,158***	***256,776***		
Average 2010		**77.1**				**17.3**		
Average 2009		***74.9***				***15.9***		

1. Cattle figures for 2009 and 2010 were derived from APHIS

Table 4.17 Distribution of (a) slaughter cattle one year-old and over and (b) total cattle by herd size, June 2010[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	5,379	12,831	28.0	3.1	957	2,540	4.7	0.2
5 - 9	3,838	25,901	20.0	6.3	1,486	10,468	7.3	0.7
10 - 19	3,891	53,932	20.3	13.1	2,974	42,611	14.7	2.7
20 - 29	2,037	49,063	10.6	12.0	2,428	58,930	12.0	3.7
30 - 39	1,295	44,153	6.7	10.8	1,869	63,916	9.2	4.0
40 - 49	802	35,418	4.2	8.6	1,479	65,472	7.3	4.1
50 - 69	890	51,708	4.6	12.6	2,089	123,007	10.3	7.7
70 - 99	525	43,164	2.7	10.5	2,043	170,509	10.1	10.6
100 - 199	428	56,041	2.2	13.7	3,038	424,444	15.0	26.5
200 - 299	71	17,241	0.4	4.2	1,081	261,593	5.3	16.3
300 & over	43	20,985	0.2	5.1	846	380,866	4.2	23.7
Total 2010	**19,199**	**410,437**	**100.0**	**100.0**	**20,290**	**1,604,356**	**100.0**	**100.0**
Total 2009	***19,125***	***403,702***			***21,228***	***1,599,025***		
Average 2010		**21.4**				**79.1**		
Average 2009		***21.1***				***75.3***		

1. Cattle figures for 2009 and 2010 were derived from APHIS

Table 4.18 Distribution of (a) ewes and (b) total sheep by flock size, June 2010

Number per farm	Ewes: Numbers of Farms	Ewes: Numbers of Ewes	Ewes: Percentages of Farms	Ewes: Percentages of Ewes	Total sheep: Numbers of Farms	Total sheep: Numbers of Sheep	Total sheep: Percentages of Farms	Total sheep: Percentages of Sheep
1 - 24	1,621	21,940	19.4	2.5	850	11,206	10.0	0.6
25 - 49	1,684	59,964	20.2	6.8	1,080	39,050	12.6	2.1
50 - 99	2,201	154,504	26.4	17.6	1,606	117,705	18.8	6.4
100 - 199	1,719	234,959	20.6	26.8	2,089	299,376	24.5	16.2
200 - 299	599	143,170	7.2	16.3	1,107	271,155	13.0	14.7
300 - 399	238	79,544	2.9	9.1	592	203,821	6.9	11.0
400 - 499	120	52,690	1.4	6.0	350	156,634	4.1	8.5
500 - 699	90	51,663	1.1	5.9	437	254,364	5.1	13.8
700 - 999	48	38,643	0.6	4.4	244	200,648	2.9	10.9
1,000 & Over	28	38,824	0.3	4.4	187	293,735	2.2	15.9
Total 2010	**8,348**	**875,901**	**100.0**	**100.0**	**8,542**	**1,847,694**	**100.0**	**100.0**
Total 2009	***8,432***	***892,382***			***8,621***	***1,896,722***		
Average 2010		**104.9**				**216.3**		
Average 2009		***105.8***				***220.0***		

Table 4.19 Distribution of breeding sows by herd size, June 2010

Number per farm	Sows (including gilts): Numbers of Farms	Numbers of Sows	Percentages of Farms	Percentages of Sows
1 - 9	214	600	51.0	1.6
10 - 19	32	438	7.6	1.1
20 - 49	44	1,387	10.5	3.6
50 - 99	38	2,819	9.0	7.3
100 - 199	51	7,488	12.1	19.4
200 - 299	14	3,172	3.3	8.2
300 - over	27	22,604	6.4	58.7
Total 2010	**420**	**38,508**	**100.0**	**100.0**
Total 2009	***402***	***38,183***		
Average 2010		**91.7**		
Average 2009		***95.0***		

Table 4.20 Distribution of (a) fattening pigs 20kg and over and (b) total pigs by herd size, June 2010

Number per farm	Fattening pigs 20kg & over: Numbers of Farms	Numbers of Pigs	Percentages of Farms	Percentages of Pigs	Total pigs: Numbers of Farms	Numbers of Pigs	Percentages of Farms	Percentages of Pigs
1 - 9	69	258	19.8	0.1	206	543	36.7	0.1
10 - 19	23	320	6.6	0.1	41	572	7.3	0.1
20 - 49	37	1,051	10.6	0.4	51	1,620	9.1	0.4
50 - 99	20	1,382	5.7	0.6	31	2,158	5.5	0.5
100 - 199	35	5,076	10.1	2.0	34	4,808	6.1	1.1
200 - 399	32	9,080	9.2	3.7	36	11,081	6.4	2.6
400 - 999	67	44,044	19.3	17.8	57	37,642	10.2	8.9
1,000 - 1,999	42	58,962	12.1	23.8	56	81,973	10.0	19.3
2,000 & over	23	127,577	6.6	51.5	49	284,207	8.7	66.9
Total 2010	**348**	**247,750**	**100.0**	**100.0**	**561**	**424,604**	**100.0**	**100.0**
Total 2009	***339***	***256,496***			***514***	***433,539***		
Average 2010		**711.9**				**756.9**		
Average 2009		***756.6***				***843.5***		

Table 4.21 Distribution of (a) laying hens and (b) broilers by flock size, June 2010[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	24	2	18.8	0.1	29	0	9.7	0.0
1,000 - 4,999	10	35	7.8	1.7	6	19	2.0	0.2
5,000 - 9,999	40	285	31.3	13.6	8	68	2.7	0.6
10,000 - 19,999	29	408	22.7	19.5	77	1,259	25.8	10.6
20,000 - 29,999	8	194	6.3	9.2	26	606	8.7	5.1
30,000 - 49,999	10	366	7.8	17.4	86	3,199	28.9	26.8
50,000 & over	7	809	5.5	38.6	66	6,764	22.1	56.8
Total 2010	**128**	**2,099**	**100.0**	**100.0**	**298**	**11,915**	**100.0**	**100.0**
Total 2009	***129***	***2,316***			***258***	***11,418***		
Average 2010		**16,401**				**39,983**		
Average 2009		***17,951***				***44,257***		

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

Table 4.22 Distribution of total poultry by flock size, June 2010[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	107	9	16.3	0.1
1,000 - 4,999	59	167	9.0	1.0
5,000 - 9,999	94	669	14.3	4.0
10,000 - 19,999	162	2,476	24.7	15.0
20,000 - 29,999	49	1,146	7.5	6.9
30,000 - 49,999	106	3,912	16.1	23.7
50,000 & over	80	8,153	12.2	49.3
Total 2010	**657**	**16,531**	**100.0**	**100.0**
Total 2009	***644***	***16,863***		
Average 2010		**25,161**		
Average 2009		***26,184***		

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

Table 4.23 Distribution of (a) barley and (b) wheat by area of crop, June 2010

	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	38	25	1.6	0.1	8	5	1.0	0.0
1 - 4.9	980	2,804	42.4	11.5	242	739	31.1	6.8
5 - 9.9	577	4,061	24.9	16.7	205	1,473	26.4	13.5
10 - 19.9	415	5,624	17.9	23.1	188	2,563	24.2	23.5
20 - 29.9	155	3,663	6.7	15.1	65	1,507	8.4	13.8
30 - 39.9	54	1,869	2.3	7.7	24	810	3.1	7.4
40 - 49.9	32	1,410	1.4	5.8	13	561	1.7	5.1
50 & over	62	4,870	2.7	20.0	32	3,237	4.1	29.7
Total 2010	**2,313**	**24,325**	**100.0**	**100.0**	**777**	**10,895**	**100.0**	**100.0**
Total 2009	***2,498***	***26,745***			***753***	***10,122***		
Average 2010		**10.5**				**14.0**		
Average 2009		***10.7***				***13.4***		

Table 4.24 Distribution of total cereals by area of crop, June 2010

	Total cereals			
Area per farm (ha)	**Number of Farms**	**Area of Cereals (ha)**	**Percentages of Farms**	**Percentages of Cereals**
under 1	56	35	2.0	0.1
1 - 4.9	1,093	3,113	38.5	8.2
5 - 9.9	696	4,947	24.5	13.1
10 - 19.9	528	7,321	18.6	19.4
20 - 29.9	193	4,553	6.8	12.1
30 - 39.9	79	2,716	2.8	7.2
40 - 49.9	58	2,509	2.0	6.6
50 & over	134	12,585	4.7	33.3
Total 2010	**2,837**	**37,779**	**100.0**	**100.0**
Total 2009	***2,966***	***39,240***		
Average 2010		**13.3**		
Average 2009		***13.2***		

Table 4.25 Distribution of potatoes by area of crop, June 2010

	Potatoes			
Area per farm (ha)	**Number of Farms**	**Area of Potatoes (ha)**	**Percentages of Farms**	**Percentages of Potatoes**
under 1	217	93	31.5	1.9
1 - 4.9	272	643	39.5	13.0
5 - 9.9	77	523	11.2	10.6
10 - 19.9	53	691	7.7	14.0
20 - 29.9	26	621	3.8	12.6
30 - 39.9	16	542	2.3	11.0
40 - 49.9	11	462	1.6	9.3
50 & over	17	1,365	2.5	27.6
Total 2010	**689**	**4,940**	**100.0**	**100.0**
Total 2009	***672***	***5,095***		
Average 2010		**7.2**		
Average 2009		***7.6***		

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 2009/10'.

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 2009/10. However, provisional income estimates are also presented below for the 2010/11 year.

Income measures

Farm Business Income (FBI) was introduced in January 2008 as the 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), the previous headline measure of farm income will continue to be published for an interim period, but as a secondary measure in line with the views expressed during consultation. 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 2005/2006 are presented in Table 5.1.

Income changes 2009/10

Cash Income, Farm Business Income and Net Farm Income by type of farm for the years ending mid-February 2008/09 and 2009/10 are presented in Tables 5.3 to 5.5. These income figures are for a sample of 293 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 type of farm business excluded from the FBS is horticulture. However, in the 2009/10 accounting period, it was not possible to obtain an adequate sample to permit the estimation of robust average income figures for General Cropping type farms. Those General Cropping type farms within the sample are included in the estimation of average incomes for the 'All types' category.

At the individual farm type level the results show that Farm Business Income and Net Farm Income decreased between 2008/09 and 2009/10 on all farm types with the exception of Pigs and Cattle & Sheep (LFA) farms. Measured across all farm types, average Farm Business Income decreased from £25,663 in 2008/09 to £21,586 in 2009/10, a fall of £4,077 per farm. Also measured across all farm types, average Net Farm Income decreased from £18,600 in 2008/09 to £14,223 in 2009/10, which is a decrease of £4,377 per farm. In terms of Cash Income, Pigs, Cattle & Sheep (LFA) and Cattle & Sheep (Lowland) farm types showed an increase in 2009/10 when compared to the previous year, whereas Cereals, Dairy and Mixed farm types showed a decrease. Measured across all farm types Cash Income decreased from £37,901 in 2008/09 to £35,091 in 2009/10 which is a decrease of £2,810.

Provisional estimates of incomes for 2010/11

Provisional estimates of incomes for full time farm businesses for the year ending mid-February 2011 show average Farm Business Income measured across all farm types increasing from £21,586 in 2009/10 to £25,903 in 2010/11 i.e. an increase of £4,317 or 20 per cent per farm. At the individual farm type level, the results show that Farm Business Income is expected to increase between 2009/10 and 2010/11 on Cereal and Dairy farms. For these farms, the increase in incomes resulted from higher product prices in the 2010/11 accounting year. The results also show that Farm Business Income is expected to fall on Cattle & Sheep (LFA), Cattle & Sheep (lowland), Pigs and Mixed Farms for 2010/11 when compared with the previous year. The downturn in incomes for these farms is the combined result of lower product prices, higher input costs and lower Single Farm Payments in the 2010/11 accounting year.

Average Cash Income measured across all farm types is estimated to increase from £35,091 in 2009/10 to £39,680 in 2010/11, which is an increase of £4,589 per farm. Whereas, average Net Farm Income measured across all farm types is estimated to be £18,743 in 2010/11 which is a £4,520 increase on the previous year.

The provisional income estimates described above were prepared in mid-January 2011 and relate to an account year ending in mid February 2011. 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 2010/11, 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.

Contact: Paul Keatley, *Tel. (028-) 90 524063,*
E-mail. paul.keatley@dardni.gsi.gov.uk

Table 5.1 Indices of average cash income in real terms by farm type, 2005/2006 to 2010/11[1]

Indices: 2000/01 - 2002/03 = 100

Business type	05/06	06/07	07/08	08/09	09/10	10/11 (provisional)
Cereals	200	196	351	270	226	345
General cropping	80	108	227	270	. . .	. . .
Pigs	. . .	897	579	567	1,219	879
Dairy	131	128	206	159	112	169
Cattle and sheep (LFA)	156	131	142	168	183	165
Cattle and sheep (lowland)	120	110	148	120	149	128
Mixed	105	139	100	229	226	209
All types	138	129	176	163	147	166

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, 2009/10

per cent

	Dairy			Cattle and sheep (LFA)			All types		
Income (£'s)	**CI**	**NFI**	**FBI**	**CI**	**NFI**	**FBI**	**CI**	**NFI**	**FBI**
Less than 0	7	23	18	6	28	13	6	27	14
1 - 4,999	6	8	5	3	13	3	4	11	6
5,000 - 9,999	2	13	11	11	10	18	7	11	13
10,000 - 14,999	4	10	10	10	11	13	8	9	12
15,000 - 19,999	14	8	7	12	10	9	11	9	8
20,000 - 29,999	11	17	19	20	17	20	17	16	19
30,000 - 49,999	24	15	15	23	6	16	24	10	15
> 50,000	32	6	15	15	5	8	23	7	13
Total	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**
Number of farms in sample		110			123			294	

Table 5.3 Cash income by business size and farm type, 2008/09 and 2009/10

£'000 per farm[1]

Business type	0.5 < 1 SLR		1 < 2 SLR		2 < 3 SLR		> 3 SLR		+ 0.5 SLR	
	2008/09	2009/10	2008/09	2009/10	2008/09	2009/10	2008/09	2009/10	2008/09	2009/10
Cereals	36.2	16.6	49.4	66.8	47.2	28.9	. . .	. . .	41.7	34.0
Pigs	. . .	. . .	. . .	. . .	. . .	. . .	. . .	. . .	22.2	59.9
Dairy	19.7	13.2	33.8	26.1	54.2	41.5	102.1	67.3	57.4	40.4
Cattle and sheep (LFA)	16.8	17.3	35.3	42.4	78.6	86.9	88.1	107.5	27.0	30.2
Cattle and sheep (lowland)	9.6	13.1	30.1	34.9	49.0	39.1	. . .	. . .	22.4	24.3
Mixed	37.5	37.6	65.4	56.9	73.6	63.3	. . .	. . .	55.2	54.8
All types	17.2	17.6	35.9	38.3	57.8	53.2	99.7	73.6	37.9	35.1

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, 2008/09 and 2009/10

£'000 per farm[1]

Business type	0.5 < 1 SLR		1 < 2 SLR		2 < 3 SLR		> 3 SLR		+ 0.5 SLR	
	2008/09	2009/10	2008/09	2009/10	2008/09	2009/19	2008/09	2009/10	2008/09	2009/10
Cereals	16.2	6.3	20.4	22.4	4.4	18.4	. . .	. . .	16.2	12.8
Pigs	. . .	. . .	. . .	. . .	. . .	. . .	. . .	. . .	26.8	54.4
Dairy	12.2	6.4	22.6	14.4	35.9	20.0	60.9	30.0	35.9	19.3
Cattle and sheep (LFA)	10.6	10.8	28.1	29.2	57.9	60.6	72.7	116.6	19.5	21.2
Cattle and sheep (lowland)	6.5	6.9	29.4	25.5	28.2	19.9	. . .	. . .	17.9	16.0
Mixed	34.0	33.2	25.3	18.7	51.8	49.9	. . .	. . .	36.8	36.0
All types	11.6	11.2	25.9	24.5	39.6	31.7	63.3	42.5	25.7	21.6

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, 2008/09 and 2009/10

£'000 per farm[1]

Business type	0.5 < 1 SLR		1 < 2 SLR		2 < 3 SLR		> 3 SLR		+ 0.5 SLR	
	2008/09	2009/10	2008/09	2009/10	2008/09	2009/10	2008/09	2009/10	2008/09	2009/10
Cereals	6.6	-4.6	14.4	16.2	3.2	12.1	. . .	. . .	8.7	4.0
Pigs	. . .	. . .	. . .	. . .	. . .	. . .	. . .	. . .	29.9	57.3
Dairy	9.7	3.0	18.6	9.5	24.2	8.0	59.5	30.9	31.1	14.8
Cattle and sheep (LFA)	4.1	4.0	19.3	20.3	40.1	36.3	32.0	89.4	10.8	12.3
Cattle and sheep (lowland)	-0.3	0.1	17.4	10.0	30.1	28.3	. . .	. . .	9.9	7.0
Mixed	24.7	23.3	3.8	-3.6	27.2	19.2	. . .	. . .	23.7	21.5
All types	5.4	4.7	18.4	16.0	28.1	18.7	58.7	40.6	18.6	14.2

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, 2009/10

£'000 per farm[1]

	Cereals	Dairy	Cattle and sheep (LFA)	Cattle and sheep (lowland)	Mixed	All Types
Farm size (ESUs)	41.4	92.4	24.5	27.4	39.6	48.5
Total farm area (ha)	70.8	80.6	102.5	67.1	63.7	83.9
Farm Business income	12.8	19.3	21.2	16.0	36.0	21.6
Total tenant's capital	**90.6**	**144.8**	**78.6**	**100.0**	**157.2**	**107.6**
of which:						
Short term (working) capital						
trading livestock	5.7	29.2	29.3	50.2	64.2	33.9
crops	17.2	9.2	4.7	5.8	7.8	6.7
other	2.7	1.9	0.6	0.9	1.2	1.2
Medium term capital						
breeding livestock	1.8	61.3	18.4	16.3	13.5	31.0
machinery	63.1	43.2	25.6	26.8	70.5	34.7

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, 2008/09 and 2009/10

£'000 per farm[1]

	Dairy		Cattle and sheep (LFA)		All types	
	2008/09	2009/10	2008/09	2009/10	2008/09	2009/10
ASSETS						
Total fixed assets	1,140.7	1178.8	1,025.6	1,052.3	1,066.4	1,096.0
of which:						
land and buildings	1,039.2	1,071.2	976.1	1,000.9	999.1	1,024.8
other fixed assets	101.5	107.6	49.5	51.3	67.3	71.2
Total current assets	47.5	53.4	33.0	36.3	43.0	47.2
of which:						
trading livestock, crops and stores	38.7	41.9	33.0	36.3	40.2	43.6
debtors/other short term lending	8.8	11.5	-	-	2.9	3.7
cash in hand and at bank	-	-	-	-	-	-
A Total assets	**1,188.2**	**1,232.2**	**1,058.6**	**1,088.5**	**1,109.4**	**1,143.3**
LIABILITIES						
Total long/medium term loans	65.1	63.1	5.0	4.4	24.2	23.2
of which:						
bank/other institutional	62.8	60.6	4.7	4.3	23.3	22.4
Total short term loans	24.2	23.3	9.9	11.6	15.6	16.2
of which:						
bank overdraft	20.0	19.3	8.0	9.9	12.3	12.3
B Total external liabilities	**89.3**	**86.4**	**14.8**	**16.0**	**39.8**	**39.4**
NET WORTH (A-B)	**1,098.9**	**1,145.9**	**1,043.8**	**1,072.6**	**1,069.6**	**1,103.9**

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 2010, single factorial terms of trade increased by 6.6 per cent. The increase in this index suggests that the small increase in productivity was boosted further by an improvement in the ratio between inputs costs and farm-gate prices. **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 grew rapidly in the period 2005-2007 and after declining in 2008 and 2009 it recovered slightly in 2010.

Food Sector Performance

The performance indicators sales and value added per employee for the food and drinks processing sector indicate continued growth in recent years. Return on capital employed (ROCE) for the food and drinks processing sector is lower in comparison with other sectors of the economy and has declined slightly in recent years although it did rise in 2007.

Table 6.1 Agricultural productivity indices

Indices: 2005 = 100

	2005	2006	2007	2008	2009	2010 (provisional)
Total factor productivity in NI[1]	100.00	102.52	107.80	102.86	98.10	98.90
Total factor productivity in UK[2]	100.00	99.94	98.94	101.81	98.44	N/A
Single Factorial Terms of Trade[3]	100.00	105.09	108.65	96.63	97.61	104.08
Labour productivity in NI[4]	100.00	104.69	124.01	105.62	90.47	96.83

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. For further details on calculation of this index consult, Fleming, E. 2007 'Use of the single factoral 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

	2003	2004	2005	2006	2007	2008
Sales per employee (£)	128,352	134,602	134,837	140,946	153,037	164,026
Value added per employee (£)	25,147	26,110	26,503	26,177	28,463	29,007
Rate of return on capital employed (%)	9.0	9.8	9.4	6.7	7.5	6.9

B. RURAL ECONOMY

Methodological notes

There are many definitions of the rural population. The definition used here used here is based on Local Government Districts (LGD). There are undoubtedly better definitions of the rural population available, but this definition is preferred 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, and so data for accessible rural and less accessible rural are comparable also. The definition of more accessible and less accessible areas is based on LGDs and the split is as follows. 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 2001, using the LGD based definition of the rural population, 32 per cent of the total population are less accessible rural, 30 per cent are accessible rural and overall 62 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 2010 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 2005 to 2010. Between 2009 and 2010 the gap increased between those living in urban and less accessible rural areas. The gap in earnings decreased between those living in accessible rural areas and those living in less accessible rural areas.

Rural Businesses

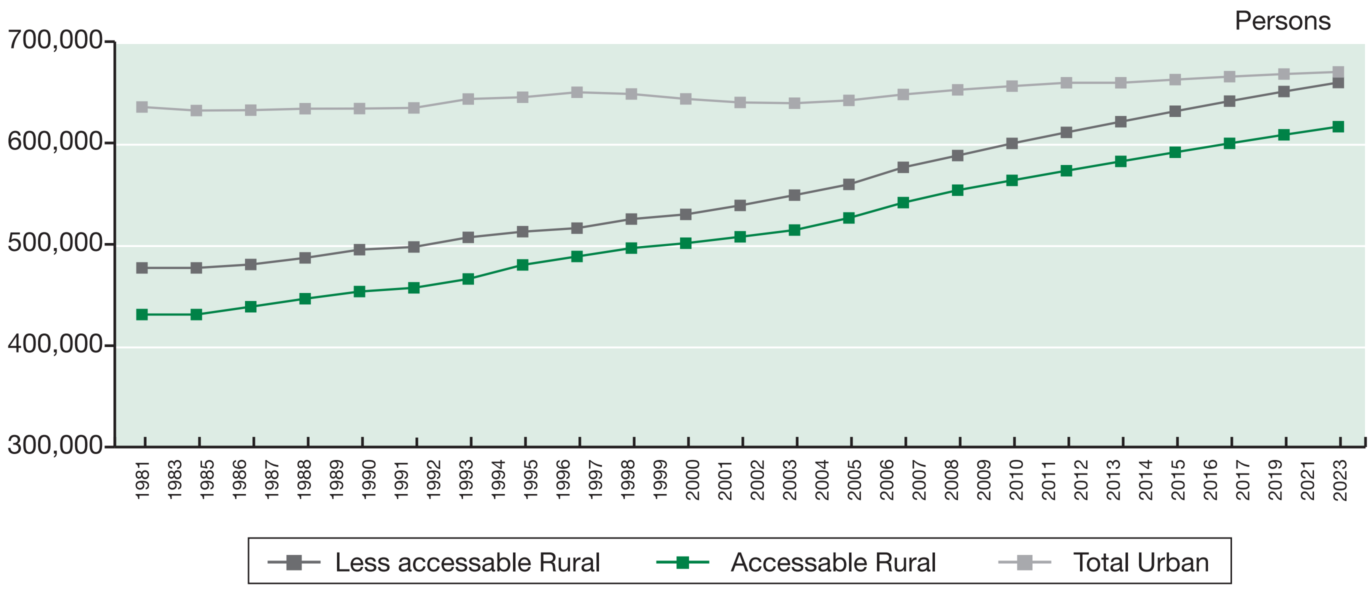
In 2010 there were around 68,525 businesses in Northern Ireland that were registered for VAT and /or PAYE schemes. Businesses are legally obliged to register for VAT once their turnover exceeds £70,000. Approximately 25 per cent of businesses are located, or have their head offices, in urban areas. The 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 23 and 35 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 2001-2010 indicates that rural areas both accessible and less accessible have demonstrated the strongest growth in net registrations by accounting 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 88 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 90 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 82 per cent.

Figure 6.1. **Population Trends and Projections in NI**[1]



1. The changes in the rural and urban populations from 1981 to 2008 are actual while those for 2009 to 2021 are estimates. Source: NISRA (NINIS website: http://www.ninis.nisra.gov.uk/)

Table 6.3 Average Gross Weekly Earnings per Person[1,2]

£ per week

	2005	2006	2007	2008	2009	2010
Urban	434.80	462.12	473.52	486.77	499.55	515.85
Accessible Rural	411.29	440.00	439.11	454.80	480.26	473.51
Less Accessible Rural	388.68	403.76	405.51	432.18	439.53	454.35

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, 2010[1,2,3]

	Urban	Accessible Rural	Less Accessible Rural	Total
	%	%	%	Number
Agriculture (incl. Fishing)	5	28	67	16,100
Production	22	32	46	4,390
Construction	21	31	48	11,445
Motor Trades	22	33	45	2,370
Wholesale	30	32	38	3,280
Retail	31	29	40	6,420
Transport & Storage (inc. postal)	20	32	48	2,345
Accommodation & Food Services	35	29	37	3,600
Information & Communication	53	26	21	1,255
Finance & Insurance	49	24	27	1,035
Property	43	25	32	1,975
Professional, Scientific and Technical	50	26	25	4,720
Business Admin & Support Services	29	31	39	2,570
Public Admin & Defence	82	9	9	55
Education	44	25	31	535
Health	43	26	31	2,550
Arts, Entertainment, Recreation & Other Services	40	30	30	3,880
All Categories	**25**	**29**	**45**	**68,525**

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, 2010 (National Statistics website: http://www.statistics.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
2001	230	1.8	110	0.7	375	1.5	720	1.3
2002	-100	-0.8	0	0	-60	-0.2	-160	-0.3
2003	40	0.3	100	0.6	125	0.5	255	0.5
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	-7,650	-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	11,660	17
2008	300	-1.9	870	4.2	2,055	6.4	3,225	4.5
2009	-345	-1.9	-235	-1.1	-355	-1.1	-935	-1.3
2010	-645	-3.7	-610	-3.0	-840	-2.7	-2095	-3.1

1. Source: Derived from UK Business: Activity, Size and Location (various years) (National Statistics website: http://www.statistics.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.

Table 6.6 VAT registered enterprises by employee size-band, Urban – Rural Classification, 2010[1]

Employee Size Band	Urban Number	Urban %	Accessible Rural Number	Accessible Rural %	Less Accessible Rural Number	Less Accessible Rural %	Total Number	Total %
0-4	11,150	22	14,810	29	24,625	49	50,585	100
5-9	3,010	31	2,860	30	3,695	39	9,565	100
10-49	2,650	37	2,055	29	2,455	34	7,160	100
50-99	300	44	160	24	215	32	675	100
100-249	160	47	85	25	95	28	340	100
250+	100	50	50	25	50	25	200	100
Total	**17,370**	**25**	**20,020**	**29**	**31,135**	**45**	**68,525**	**100**

1. Source: Derived from UK Business: Activity, Size and Location, 2010 (National Statistics website: http://www.statistics.gov.uk/)

C. ANIMAL HEALTH AND WELFARE

Disease

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 2,186 cases. The number of BSE cases in Northern Ireland has declined significantly since the peak in 1993. There were no cases of BSE in 2010.

During 2009, an additional 1,293 herds in Northern Ireland were affected by bovine tuberculosis, while 71 were newly infected with brucellosis. Bovine tuberculosis and brucellosis were at peak levels in 2002 and since that time the herd incidence for both diseases has reduced by almost 50 per cent.

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 845 on-farm welfare inspections in 2010. 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.

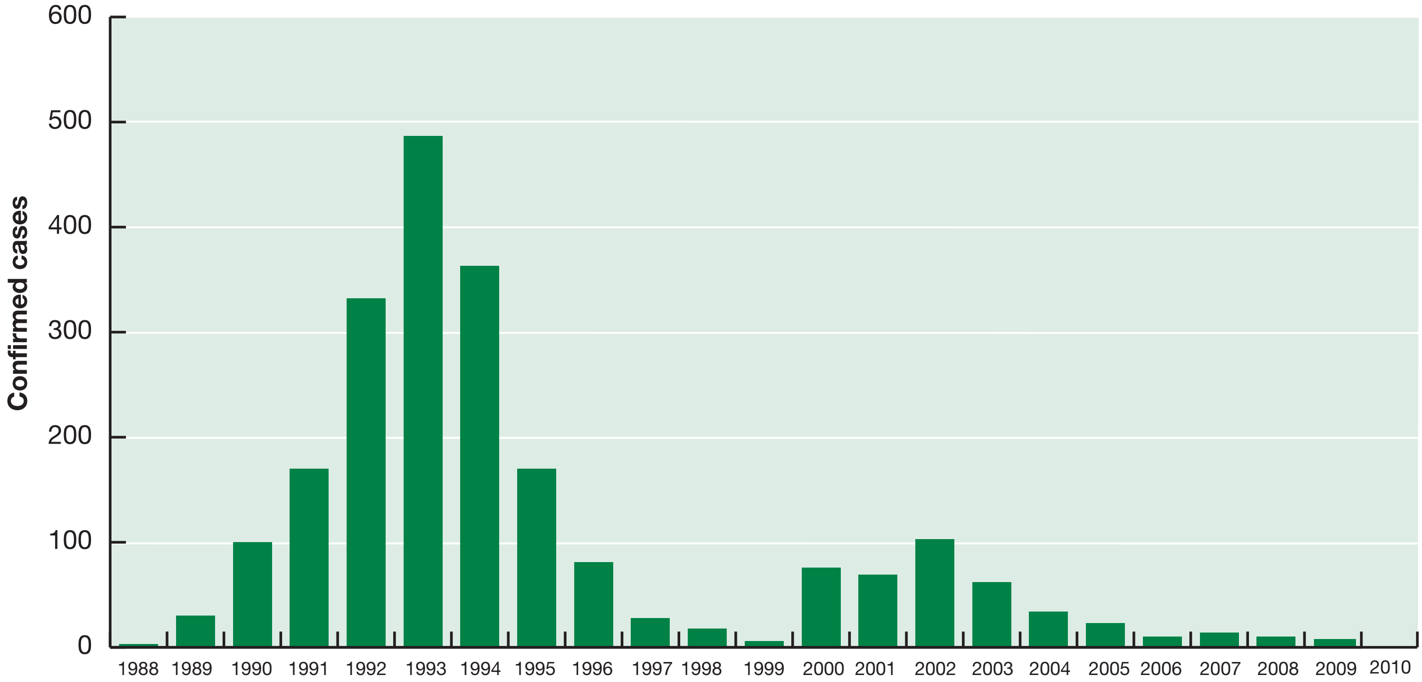
Of the 845 welfare inspections carried out on farms by the VS in Northern Ireland during 2010, 84 per cent were complaint, targeted, or cross compliance inspections (where herds are identified as being “at risk”) with the remaining 16 per cent random cross compliance checks.

Of the 135 random cross compliance inspections, 99 per cent achieved an overall assessment of compliance with legislation (compared with 95 per cent in 2007 and 97 per cent in 2008 and 2009). Non-compliance needing corrective action relating to housing, animal treatment (with action required within 3 months) or that associated with staff training, record keeping, or frequency of inspection (with time given for improvements), was found on 0.7 per cent of the 135 visits. No assessments identified a serious welfare problem requiring immediate action, with respect to application of administrative or criminal penalties.

Of the complaint and targeted visits and risk cross compliance visits in total, 81 per cent achieved compliance with legislation (compared with 68 per cent in 2007, 84 per cent in 2008 and 77 per cent in 2009). While, 19 per cent of these 710 visits indicated levels of non-compliance needing corrective action and 7.0 per cent were 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 Encephalophathy (BSE): Confirmed cases in N.I including clinical and active surveillance cases[1]**



1. Source: TSE Branch DARD, contact James Moody 028 905 24642

Table 6.7 Confirmed cases of BSE[1]

cases

Type	Category	2005	2006	2007	2008	2009	2010
Passive Surveillance	On farm suspects	1	0	0	0	0	0
	Abattoir suspects	0	0	0	0	0	0
Active Surveillance	Fallen animals	5	7	9	4	2	0
	OTM Casualty animals	15	3	3	0	-	-
	OTM Random animals	0	0	-	-	-	-
OTM Ante-Mortem Failure animals		0	0	1	0	-	-
	Over 42 months survey (including 1996/97 cohort)	0	0	-	-	-	-
	Over 48 month Human Consumption animals	-	-	-	-	1	0
	OTM Human Consumption animals	0	0	1	0	-	-
	Cohorts of BSE Cases	2	0	0	0	0	0
Total		**23**	**10**	**14**	**4**	**3**	**0**

1. Source: TSE Branch DARD, contact James Moody 028 905 24642

Table 6.8 Bovine Tuberculosis (TB) Statistics

	2006	2007	2008	2009
No. cattle herds eligible for TB testing[1]	27,710	25,187	26,780	26,287
Total Number of Unrestricted Herd Tests	29,218	27,250	26,881	27,519
Total number of animals TB tested	1,711,870	1,640,552	1,592,213	1,601,500
Total new herd TB incidents[2]	1,513	1,264	1,274	1,293
TB reactors slaughtered	9,383	7,299	8,391	8,198

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

	2006	2007	2008	2009
No. cattle herds eligible for BR testing[1]	25,002	23,099	24,366	23,996
Total number of unrestricted Herd Tests	27,475	25,255	25,017	23,805
Total number of animals BR tested	985,182	973,529	961,894	936,672
Total new herd BR incidents[2]	118	151	177	71
BR reactors slaughtered	314	402	384	116

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 2010

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	0.7
			B	0	0.0
			C	0	0.0
	Yes	134		134	99.3
	Total	**135**		**135**	**100.0**
Cross-compliance Risk Assessment based, other Targeted and Complaint related inspections	No	135	A	65	9.2
			B	11	1.5
			C	59	8.3
	Yes	575		575	81.0
	Total	**710**		**710**	**100.0**
All inspections	No	136	A	92	7.8
			B	27	1.3
			C	34	7.0
	Yes	709		600	83.9
	Total	**845**		**845**	**100**

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 2008, agriculture was estimated to contribute 24 per cent of all greenhouse gas emissions in Northern Ireland. Total emissions from agriculture fell by 10 per cent between 1990 and 2008.

Agri-environmental schemes

Agri-environmental schemes are managed in Northern Ireland under the Rural Development Programme (RDP). In 2010, some 464,000 hectares or 42 per cent of farmland was registered in an agri-environmental scheme in Northern Ireland.

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. Austria has the highest proportion of farmland under organic management amongst the EU-15, while Northern Ireland has the lowest. 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.

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 2009, 25 per cent of river water-bodies were classified as ‘high’ or ‘good’. This is an increase of four percentage points compared with 2008.

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 2009, 7.7 per cent of salmonid river length and 13 per cent of cyprinid river length failed to meet the standards set by the Directive.

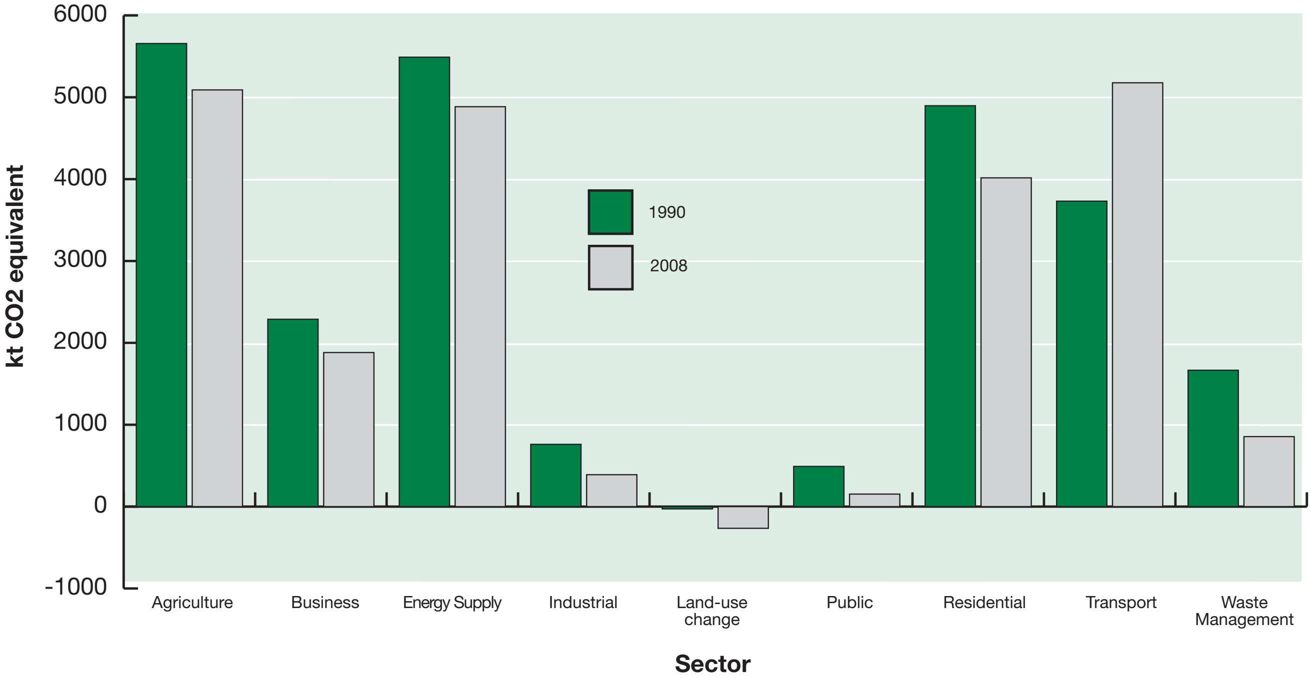
Forestry

In Northern Ireland the state owned forest area has changed little since 1995. The area of privately owned forest has increased by 42 per cent over the same time period, but the rate of increase has slowed in recent years. The volume of timber produced by state forests has increased by 96 per cent since 1995.

The area of woodland in the UK has increased over the past century. Approximately 5 per cent of the UK was covered by woodland in 1924; in 2005 almost 12 per cent of the UK was wooded. Figures for 2004 indicate that woodland covered 17 per cent of Scotland, 14 per cent of Wales, and 9 per cent of England.

The level of forest cover within the EU27 countries varies considerably. At around 6 and 10 per cent respectively, Northern Ireland and the Republic of Ireland are the two least densely forested countries in the EU27. The two most densely forested countries are Finland and Sweden with 74 and 67 per cent of the total land area with forest cover.

Figure 6.3 Total greenhouse gas emissions in Northern Ireland by sector, 1990 & 2008



Source: AEA Technology, Oxfordshire, UK

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

'000 hectares

Country	2005	2006	2007	2008	2009	2010
Organic Farming Scheme	6	10	6	6	7	5
Countryside Management Scheme	118	318	317	315	352	351
New Environmentally Sensitive Area Scheme	131	141	131	122	109	108

1. Source: Countryside Management Division, DARD.

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

thousand hectares

Country	1998	2003	2004	2005	2006	2007	2008
Northern Ireland	…	8	7	10	9	11	13
Wales	…	58	64	71	79	96	125
Scotland	…	372	345	248	235	228	231
England	…	257	259	292	296	348	375
UK	79	695	675	620	620	682	744

1. Source: DEFRA

Table 6.13 Percentage of river water-bodies achieving Water Framework Directive classifications overall

Number of river water-bodies

	2008		2009	
Classification	**River waterbodies**	**%**	**River waterbodies**	**%**
High	2	0.3	6	1.0
Good	121	21.0	140	24.3
Moderate	181	49.0	258	44.9
Poor	148	25.7	142	24.7
Bad	21	3.7	28	4.9
No data	1	0.2	1	0.2

1. Source: NIEA

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

Unit: Percentage river length fail hectares

Country	2004	2005	2006	2007	2008	2009
Salmonid	9.4	10.1	7.6	13.2	5.7	7.7
Cyprinid	15.1	27.0	8.0	27.0	22.0	12.7

1. Source: NIEA Northern Ireland Environmental Statistics Report January 2010.

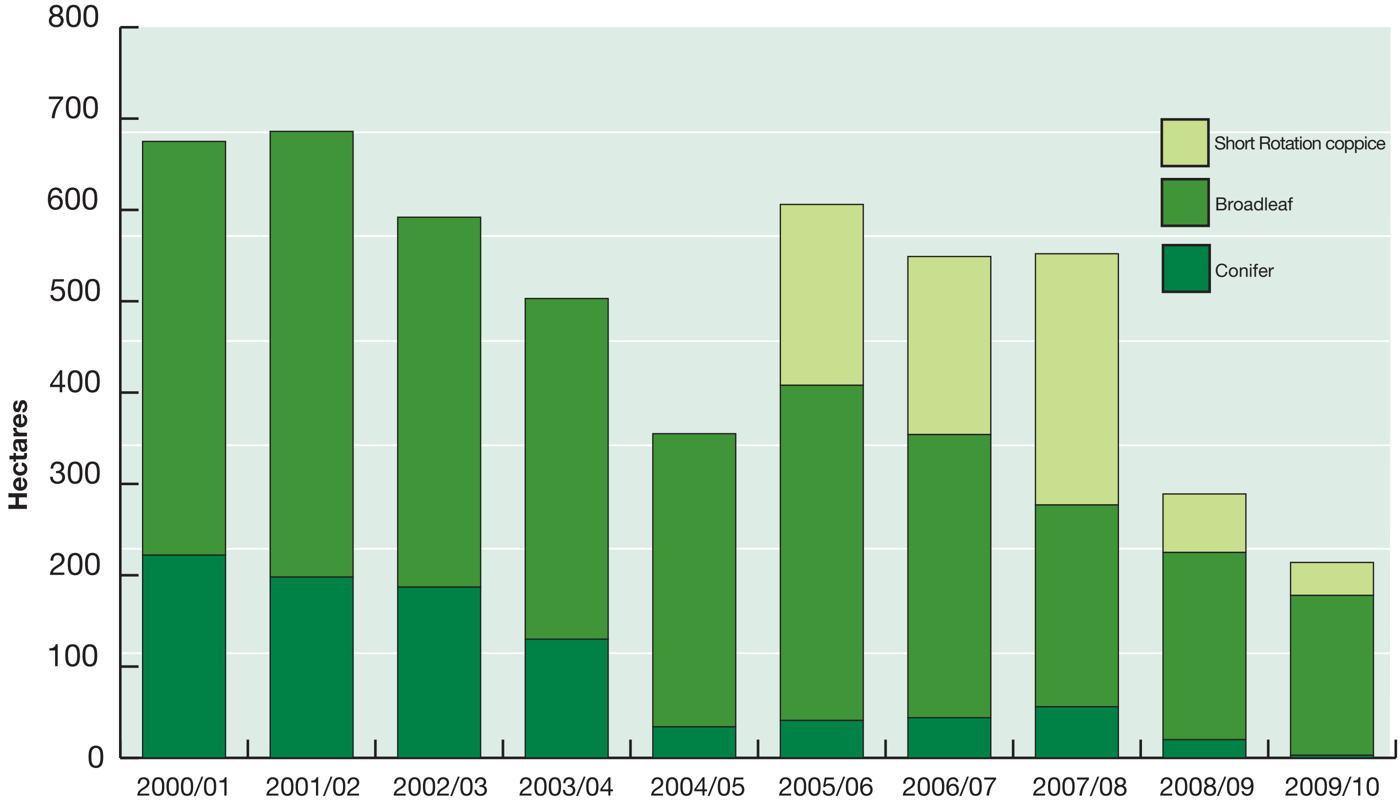
2. Salmonids are salmon and trout, while cyprinids are coarse fish.

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

	1995-96	2000-01	2005-06	2007-08	2008-09	2009/10
Forested area (000ha)						
State	61	61	61	61	61	61
Private	19	22	25	26	26	27
All forested areas	**80**	**83**	**86**	**87**	**87**	**88**
Timber production from state forests						
Volume (000 cubic metres)	223	359	387	423	405	438
Visitors to Forest Parks						
Day Visitors (000's)	…	…	370	440	378	397
Employees (number) Forest Service	460	360	288	236	230	230

Source: Forest Service, DARD

Figure 6.4 Area of new forest and woodland plantings



Source: Forest Service, DARD

Table 6.16 Forest cover, 2005 – international comparisons

Country	Forest area (000 ha)	Total land area (000 ha)	Forest as a % of land area
Northern Ireland	85	1,345	6.3
UK	2,845	24,088	11.8
France	15,554	55,010	28.3
Finland	22,500	30,447	73.9
Sweden	27,528	41,162	66.9
EU27	155,584	419,185	37.1
World	3,952,025	13,052,852	30.3

Source: FAO Global Forest Resources Assessment 2005 – Annex 3 Global tables (not National Statistics)

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. (Previously, when it was conducted on a 'branch' basis, agricultural activity covered all agricultural products irrespective of the nature of the establishments in which they were produced and excluded other, non-agricultural activity taking place on farms.)

(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. (Previously, subsidy payments were dealt with on a cash, or 'as paid', basis.)

(iii) Rent paid on 'conacre' (short-term lettings) to non-farming persons is included as an expense. (All conacre rent was previously omitted because short-term renting was deemed to be a transfer within the agricultural branch.)

(iv) Capital formation in, and depreciation of, breeding livestock is included. (Previously, only net volume changes were 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. (Such transactions were previously excluded when the AAA was conducted on a 'national farm' basis.)

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 farm families is given by **total 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 2010 would change by almost ±10 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 2010 presented in this *Review* are estimates based on data available during the period from December 2010 to January 2011, in most cases covering only the first 9-11 months of the year (2010). 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 2009 figures have been revised as more complete information has become available. Net value added in 2009 is now estimated at £362.3 million (previously £387.6 million) while total income from farming for 2009 is now estimated at £219.7 million (previously £243 million). A 25-year consistent series of the AAA is available on the DARD website at www.dardni.gov.uk

Single Farm Payment

The **Single Farm Payment (SFP)** was introduced in 2005 and many of the direct payments that were attributable to particular sectors and payable on a per head or per hectare basis. The treatment of the **SFP** in the aggregate agriculture accounts is different from that of the direct payments because it is not attributable to any one sector. Direct payments such as Beef Special Premium and Suckler Cow Premium were included in the **gross output** figures because they were attributable to finished cattle and calf production. Thus, while Beef Special Premium and Suckler Cow Premium appear in the **gross value added** figures the SFP does not. However, SFP is added to gross value added as part of the **net value added** calculation. As a consequence **gross value added** figures from 2005 are much lower than the figures before and they are not strictly comparable. The **net value added** and **total income from farming** figures are comparable between pre-2005 and post-2005.

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 usually an annual statistical survey which is based on a large sample survey, however in 2000 and 2010 a full census of every farm was conducted.

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 2010 return was not obtained, estimates were based on the IACS and other administrative systems. Owners of pig herds or mushroom enterprises who failed to make a return in 2010 were contacted by telephone in order that up to date information could be obtained.

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.

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 below.

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
onwards			
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

The EU system of classifying farms according to farm type (on which the UK system is based) is set out in Commission Decision 85/377/EEC. Although 72 different types are recognised by the EU, for UK statistical purposes these are grouped into 9 robust categories, which have particular relevance to UK conditions. These are:

Type	Definition
Cereals	Farms with more than 2/3 of their total SGM in cereals, oilseeds and set aside.
General cropping	Farms which do not qualify as cereals farms but have more than 2/3 of their total SGM in arable (not horticultural) crops or in a mixture of arable and horticultural crops and where arable crops account for more than 1/3 of total SGM.
Horticulture	Farms with more than 2/3 of their total SGM in horticultural crops (excluding specialist mushroom growers).
Pigs & poultry	Farms with more than 2/3 of their total SGM in pigs and/or poultry.
Dairy	Farms with more than 2/3 of their total SGM in dairying (including associated young stock).
Cattle & sheep (LFA)	Farms wholly or mainly in the Less Favoured Areas which do not qualify as dairy farms but have more than 2/3 of their total SGM in cattle and sheep.
Cattle & sheep (lowland)	Farms entirely or mainly outside the Less Favoured Areas, which do not qualify as dairy farms but have more than 2/3 their total SGM in cattle and sheep.

Other types	Farms which specialise in enterprises which do not fit in with mainstream agriculture, such as specialist mushrooms, specialist goat and specialist horse farms; also farms which are unclassified because they have no crops or stock at June (but which made hay/silage or intended to restock at a later date).

A fuller description of the system is given in '*Farm Incomes in the United Kingdom*' 1991/92 Edition (HMSO, 1993) and in '*The Digest of Agricultural Census Statistics, UK 1993*' (HMSO, 1994).

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, 2009/10, the FBS obtained farm accounts information from 375 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

OTHER PUBLICATIONS AVAILABLE

Policy and Economics Divison produce a range of publications and statistical series, which are now available free of charge on the DARD website at www.dardni.gov.uk. The following publications are also available in hard copy on request using the order form below.
The year of issue is given in brackets.

EU Structure Survey 2010 Northern Ireland: Report on the agricultural labour force, farm diversification, use of contractors (2011) £10.00

The Agricultural Census in Northern Ireland: Results for June 2010 (2010) £10.00

Farm Business Data 2011. (2011) £7.50

Statistical series (prices in brackets are for e-mail delivery)

Agricultural Market Report, Weekly and Quarterly. (Continuous) £50.00 (£36.00) and £19.50 (£18.00) per annum respectively

Animal Feedstuffs Statistics, Monthly, Quarterly and Annual. (Continuous) £35.00 (£30.00), £19.50 (£18.00) and £12.00 (£12.00) per annum respectively

Fertiliser Statistics, Quarterly and Annual. (Continuous) £19.50 (£18.00) and £12.00 (£12.00) per annum respectively

Milk Utilisation Statistics, Monthly and Annual. (Continuous) £35.00 (£30.00) and £12.00 (£12.00) per annum respectively

Pig Financial Results, Monthly. (Continuous) £23.00 (£20.00) per annum

Order form for hard copies

Please forward ____ copy/copies of the following publication/s ____________________

____

____

To the address below:

Name ____

Address ____

____

____

Telephone ________________ Signature ________________ Date ____________

Return order form to: Department of Agriculture and Rural Development,
Room 656, Dundonald House, Upper Newtownards Road, BELFAST BT4 3SB
Tel: (028) 9052 4594 Fax: (028) 9052 4676

Policy and Economics Division
Department of Agriculture and Rural Development
Dundonald House
Upper Newtownards Road
Ballymiscaw
BELFAST
BT4 3SB

Department of
Agriculture and
Rural Development

www.dardni.gov.uk

AN ROINN
Talmhaíochta agus
Forbartha Tuaithe

MÄNNYSTRIE O
Fairms an
Kintra Fordèrin

INVESTORS
IN PEOPLE

ISBN 978 1 84807 203 9
£18.00

DMS 10.11.148