

# The Agri-food Sector: Role in the Northern Ireland Economy



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# HEADLINE FIGURES

- **Agriculture**
  - Gross output (2010) £1.5 billion
  - Gross value added (2010) £378 million
- **Food and Drinks Processing**
  - Gross output (2010) £3.7 billion
  - Gross value added (2009) £608 million
- **Combined Contribution to Northern Ireland**
  - GVA 3½%
  - Employment 6%



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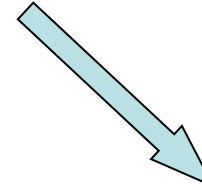
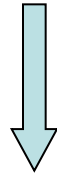
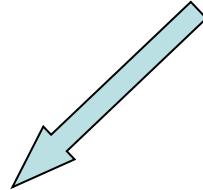
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# Food and Drinks Processing Sector Multipliers

**+£1m in food and drinks processing output**



**+£1.91m in regional economy output**

**+£0.54m in regional economy GVA**

**+22 FTE jobs in the regional economy**

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**+ 1 job in food and drinks processing**



**+ 1.91 jobs elsewhere in the regional economy**

Source: Agri-Food & Biosciences Institute



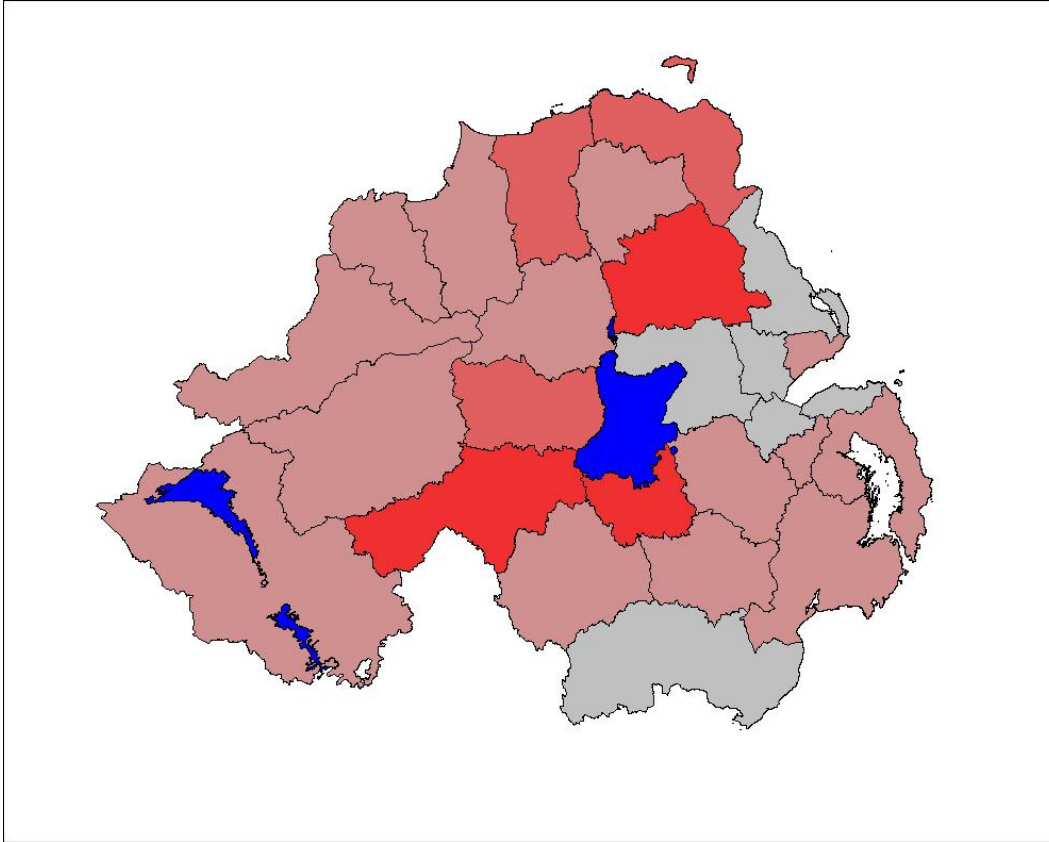
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



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# Contribution to Sub-Regional Employment



Estimate of food and drinks processing employment as percentage of total private sector employment in each Council area

	10% to 15%
	5% to 10%
	1% to 5%
	0 to 1%



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# Earnings in Food and Drinks Processing

## Average Gross Weekly Pay for Full-Time Employees 2010

SKILL LEVEL	Food and Drinks Processing	All Manufacturing
Elementary Occupations	338	347
Operatives and Customer Services	338	379
Skilled Trades & Technical Occupations	387	465
Managers and Professionals	799	711

Average annual pay food and drinks processing in 2010: £19,292

Average annual pay total private sector in 2010: £19,167

Source: DETI Annual Survey of Hours and Earnings



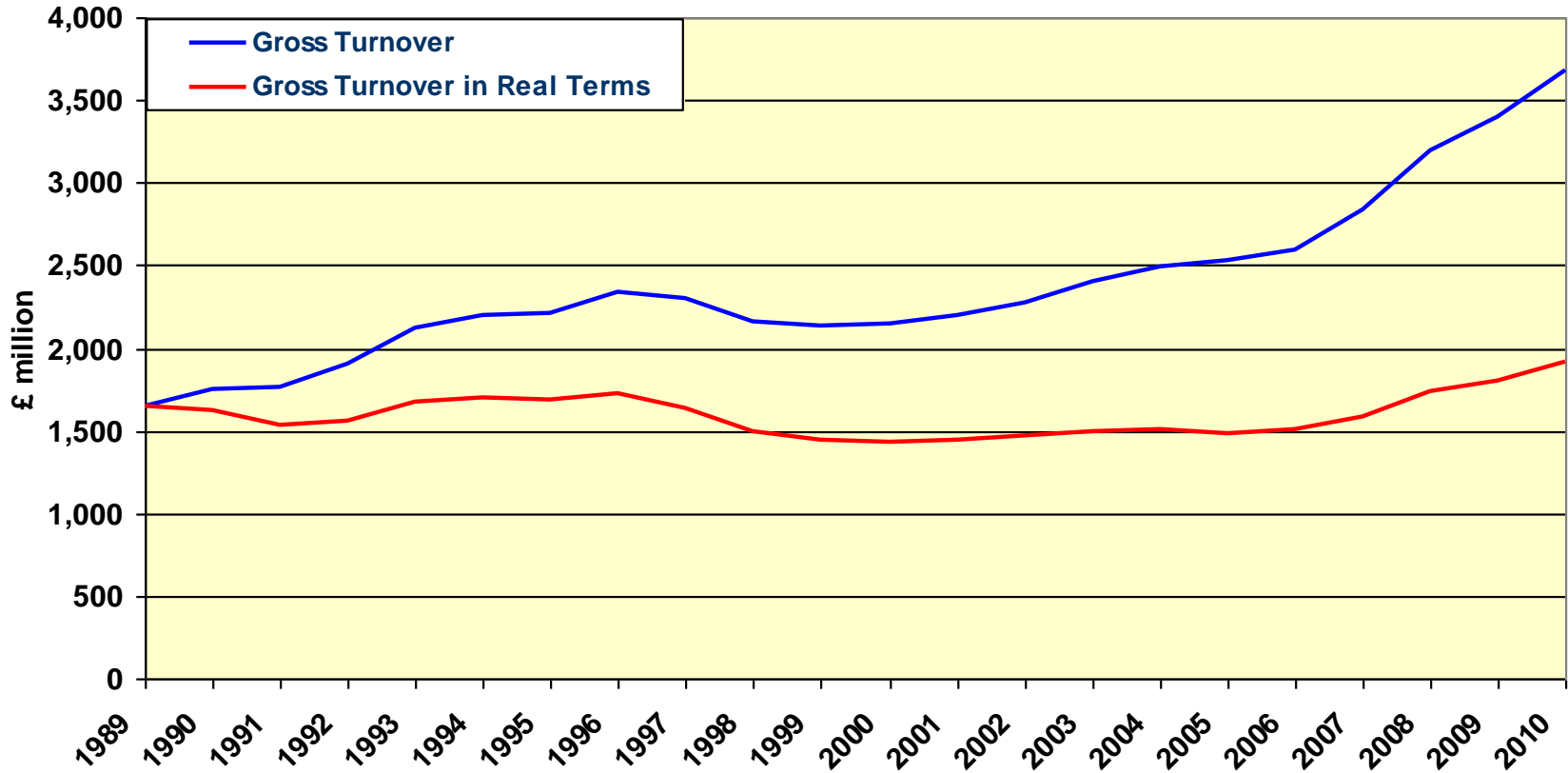
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# Turnover of the Northern Ireland Food Processing Sector



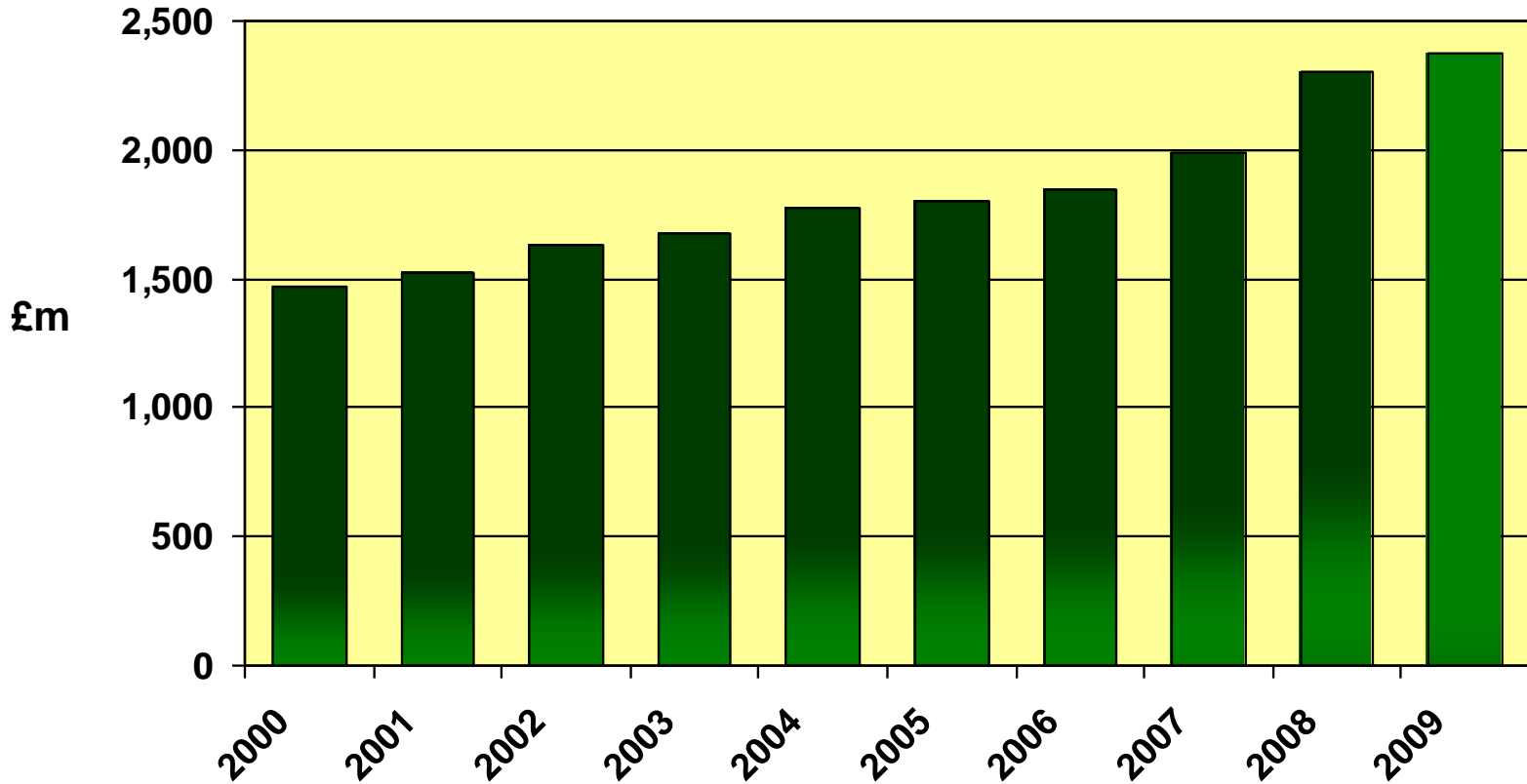
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# Food and Drinks Processing: Value of External Sales (real terms 2009)



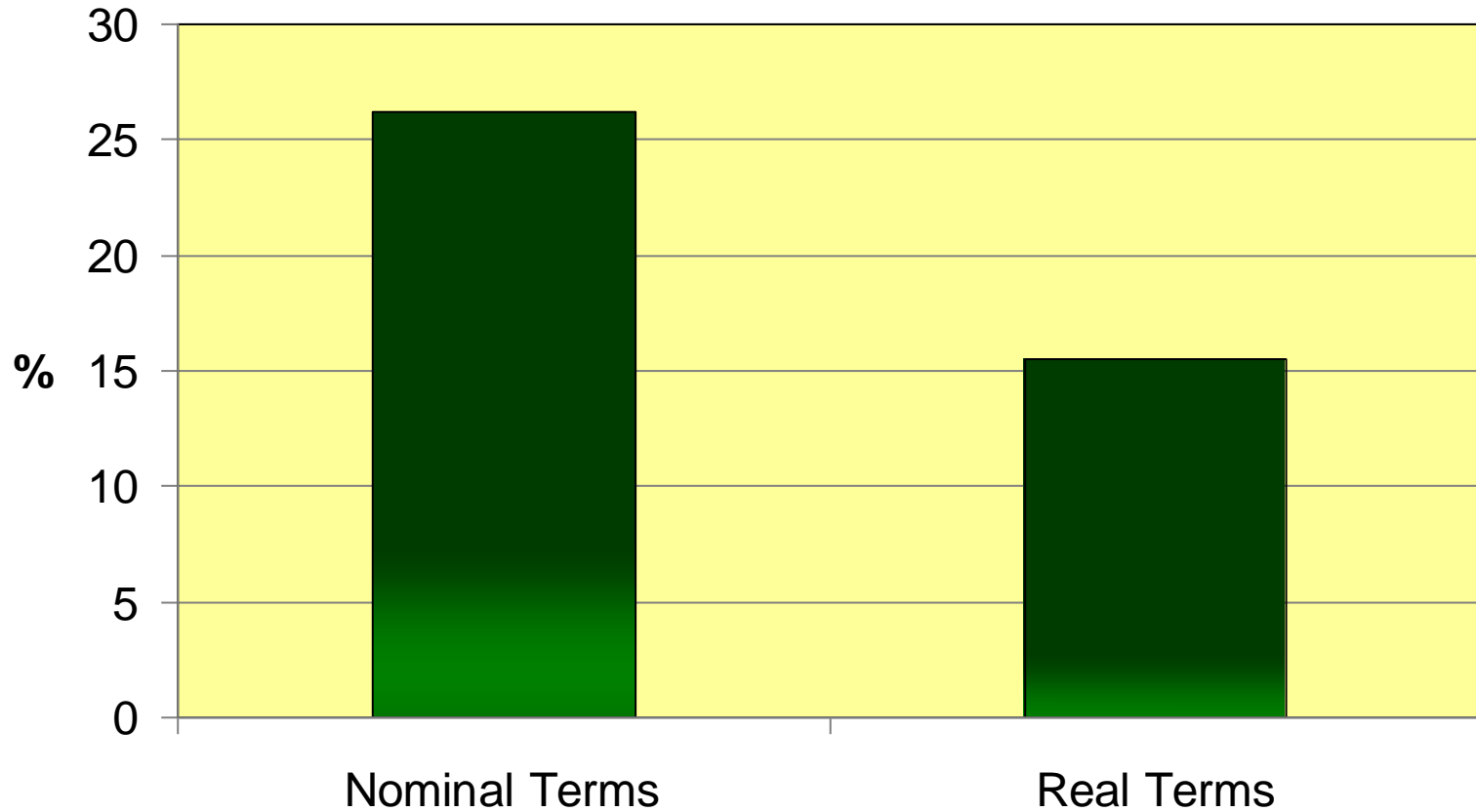
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## Growth in Food & Drinks Processing Value Added % Change 2006-2009



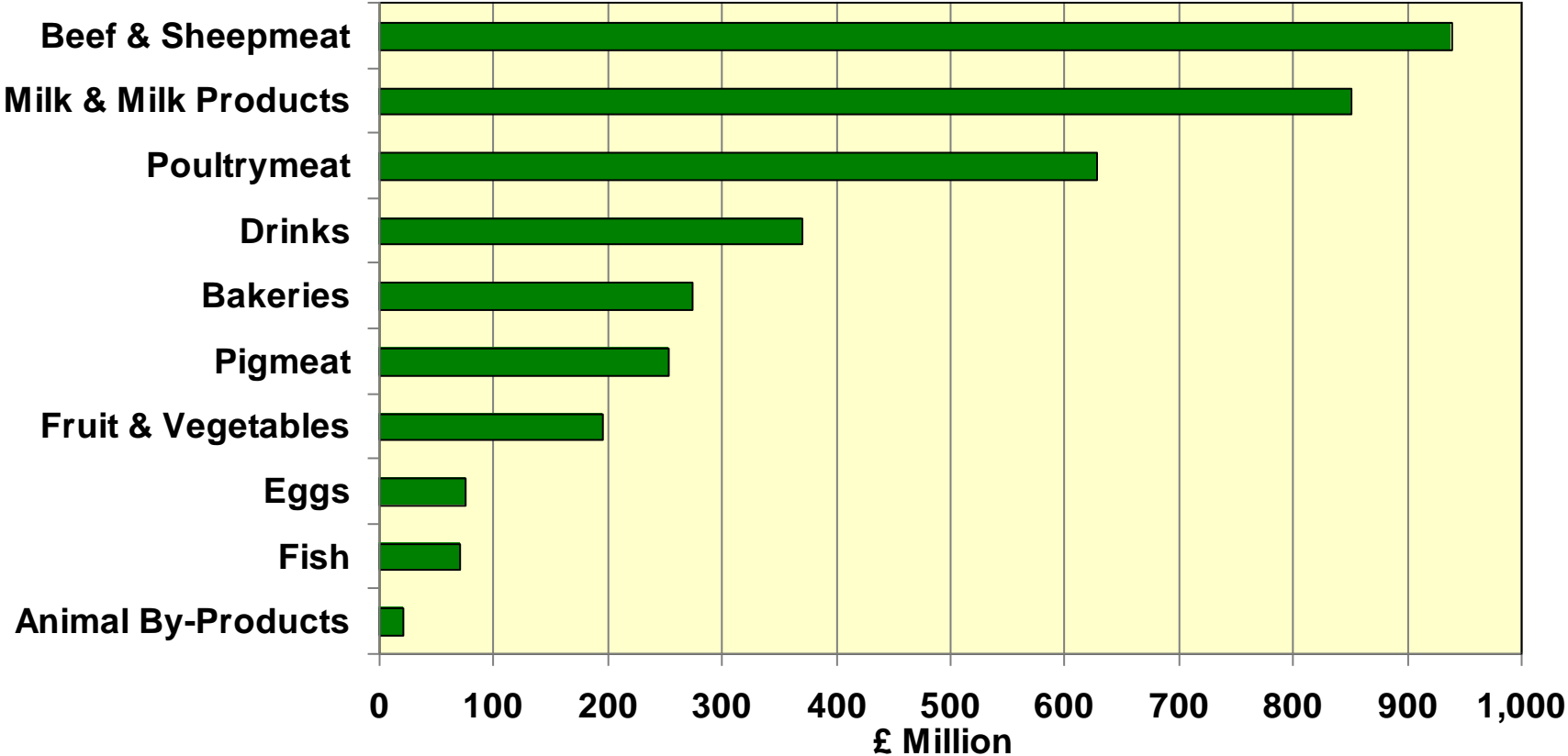
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# Gross Turnover by Sub-Sector, 2010



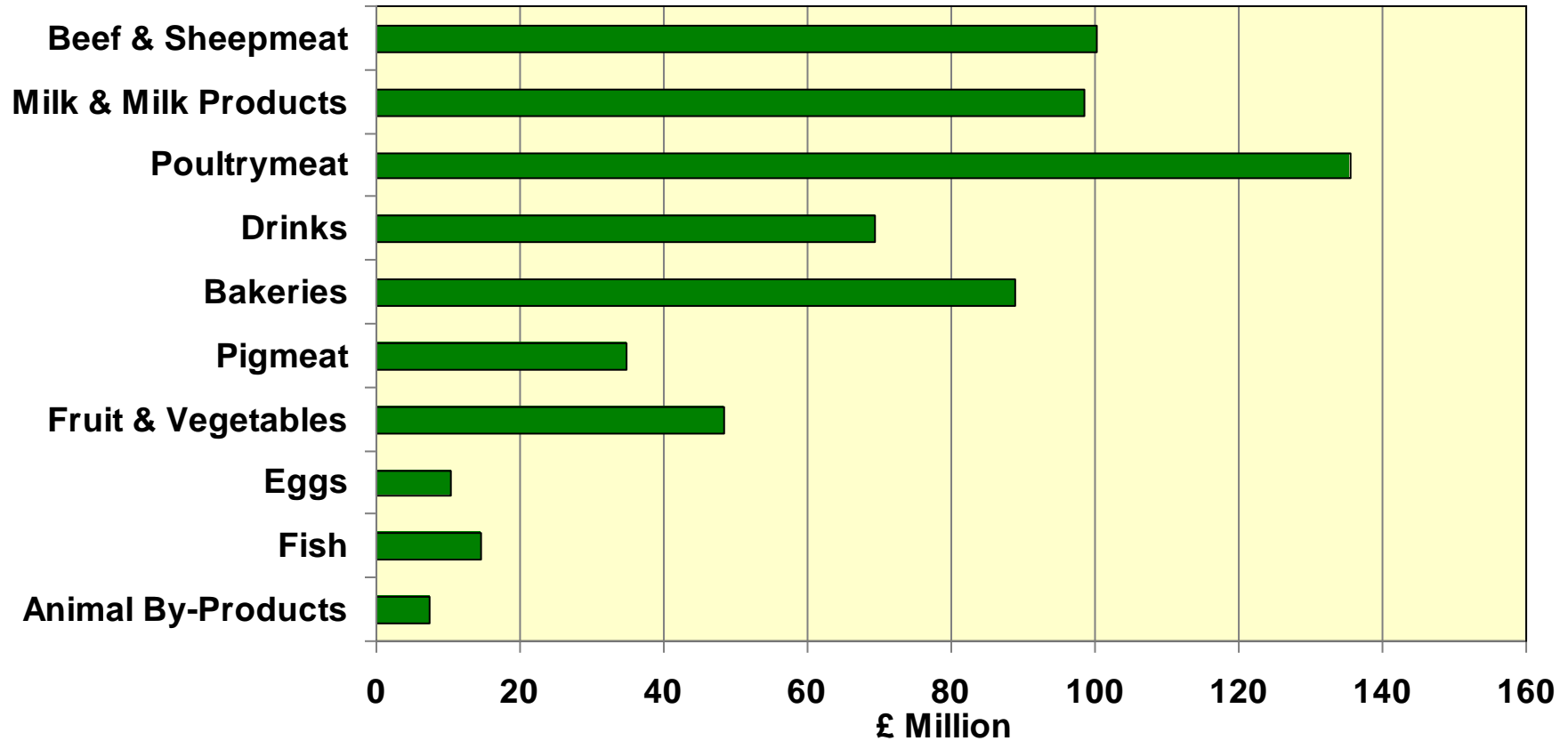
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# Value Added by Sub-Sector, 2009



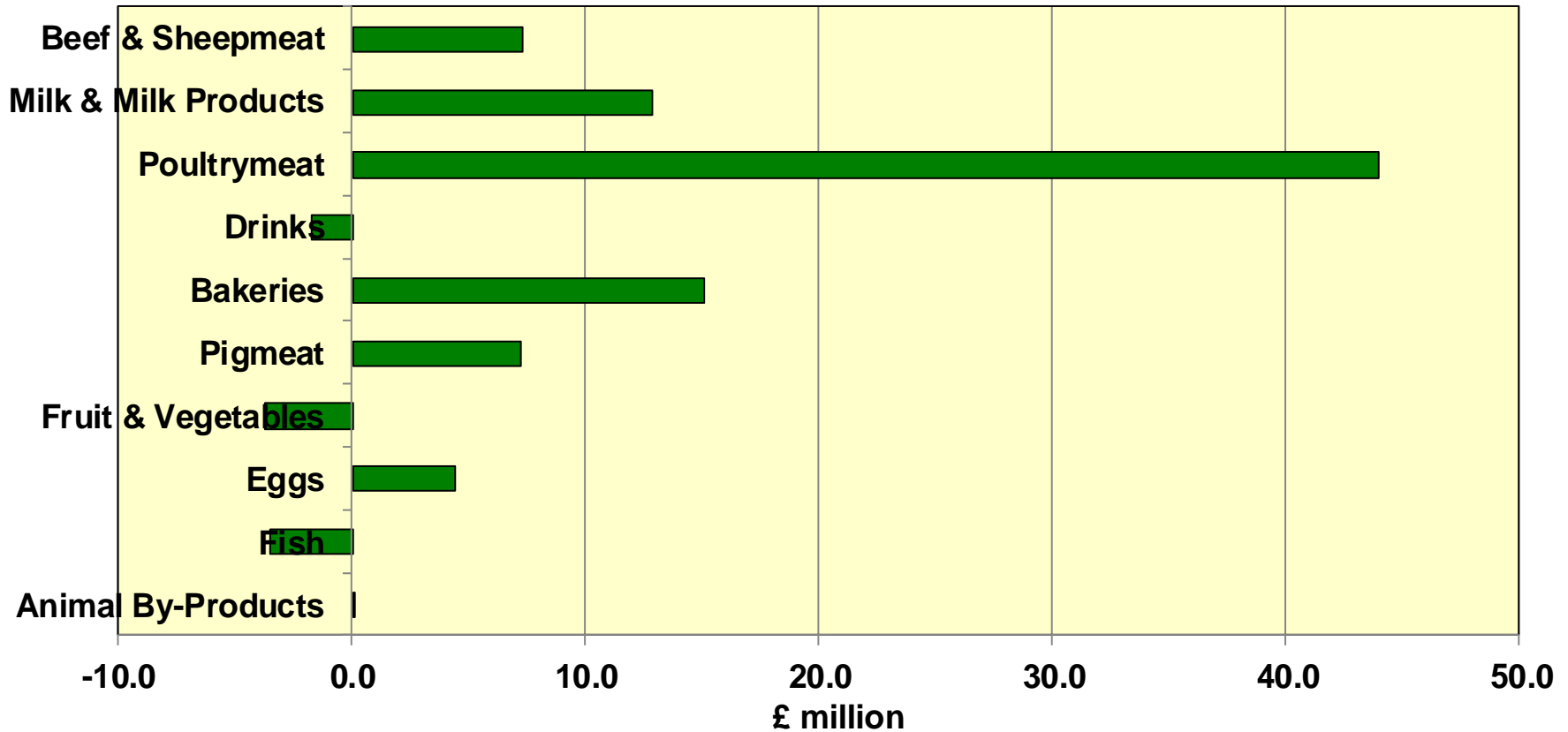
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## Value Added Growth by Sub-Sector, 2006-2009 (real terms 2009)



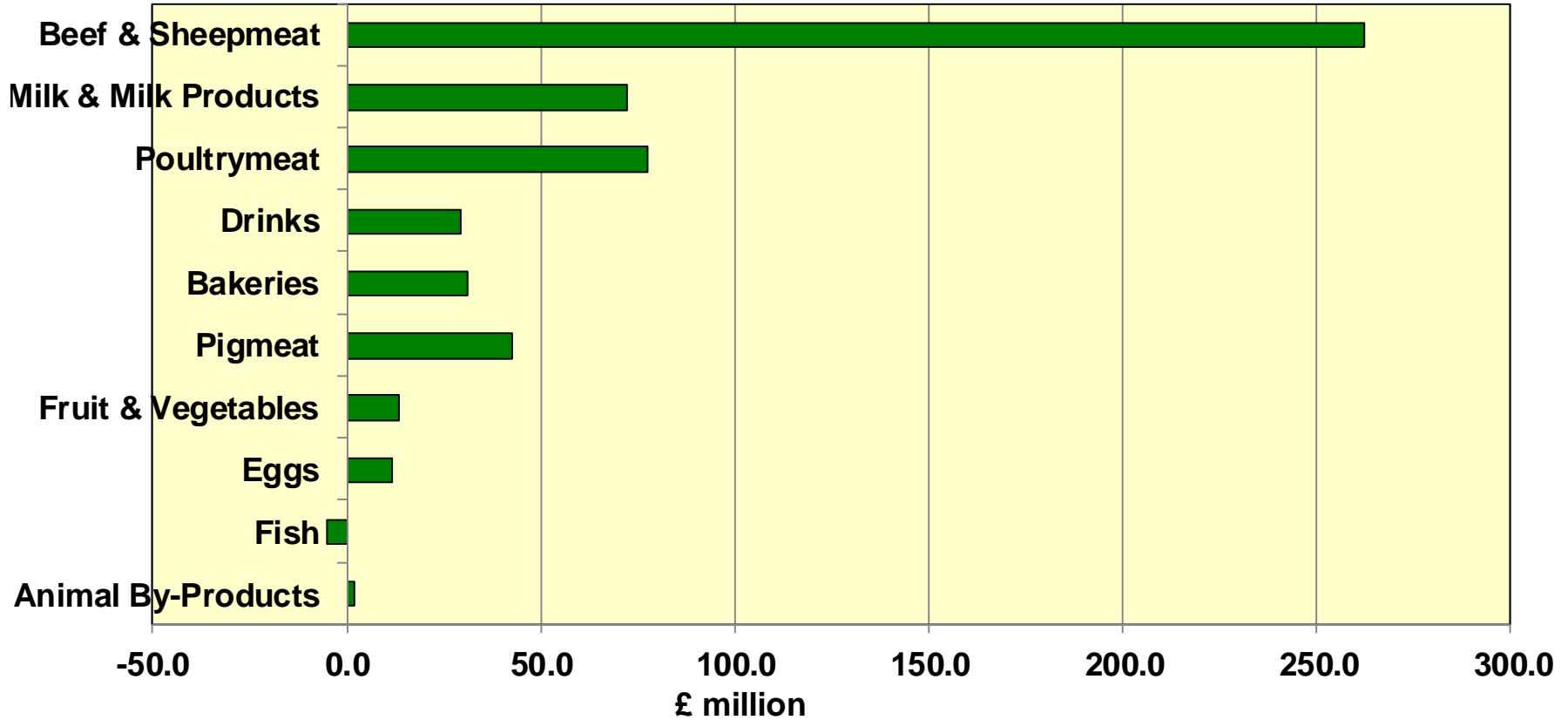
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# External Sales Growth by Sector, 2006-2009 (real terms 2009)



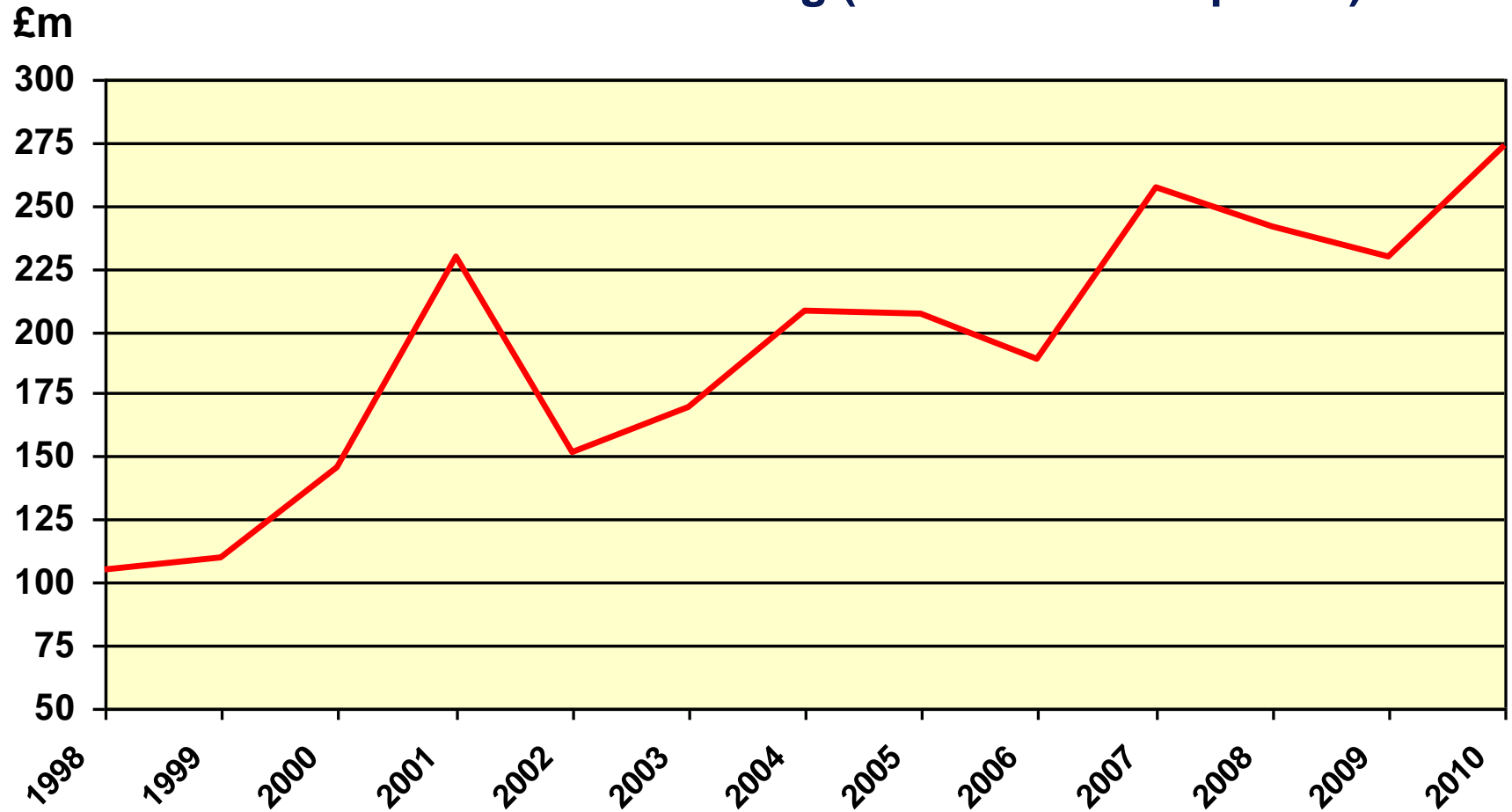
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# Total Income From Farming (real terms 2010 prices)



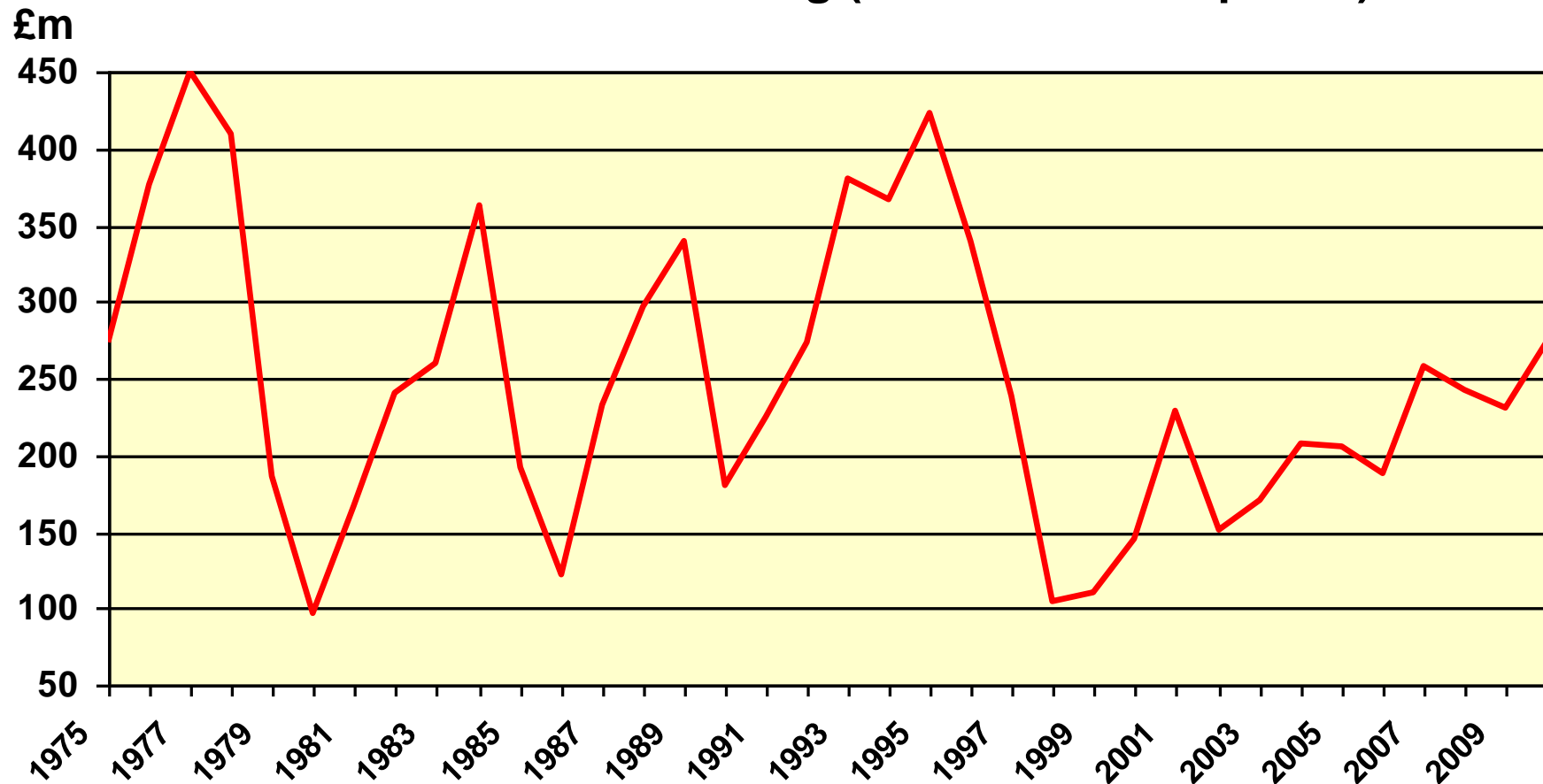
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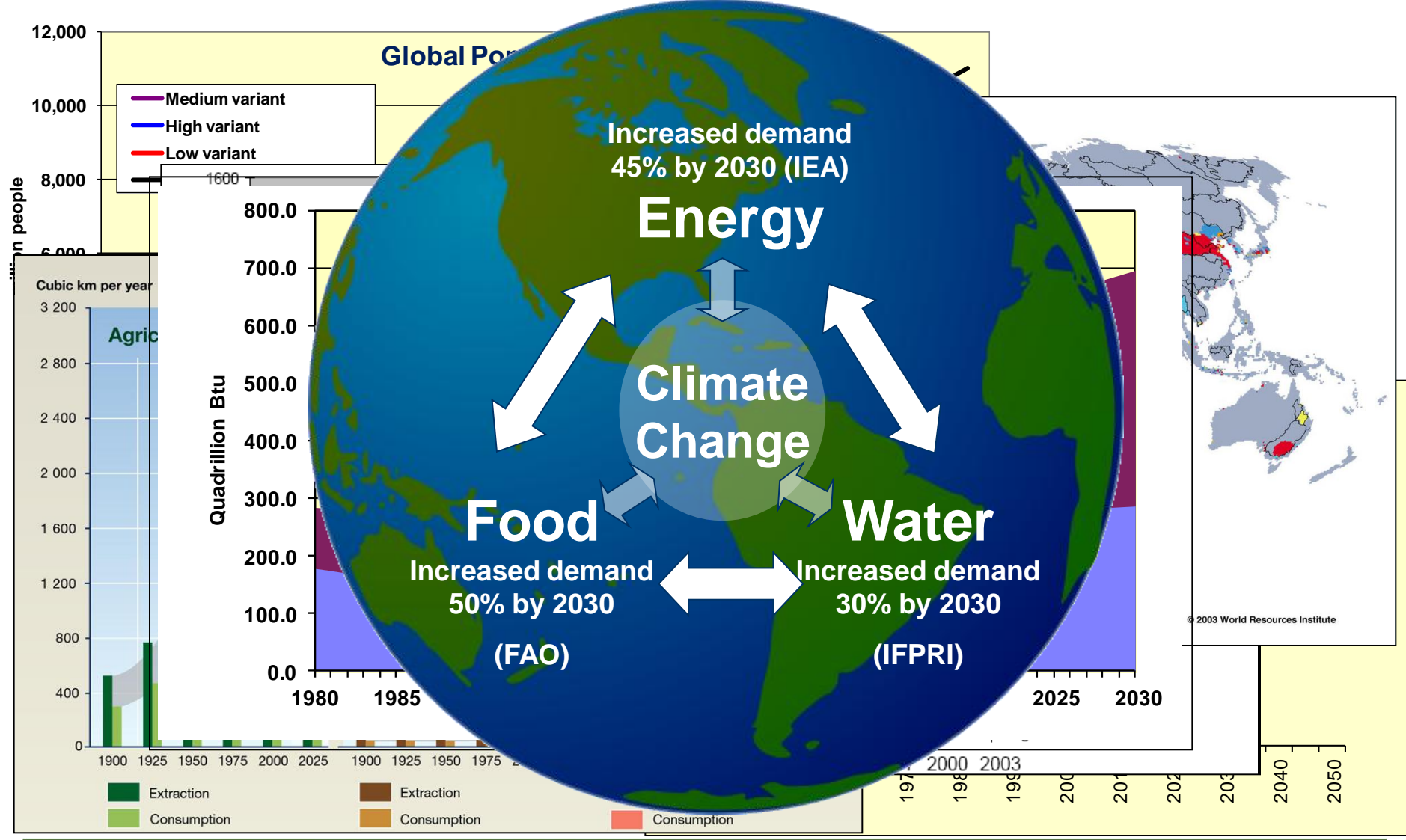


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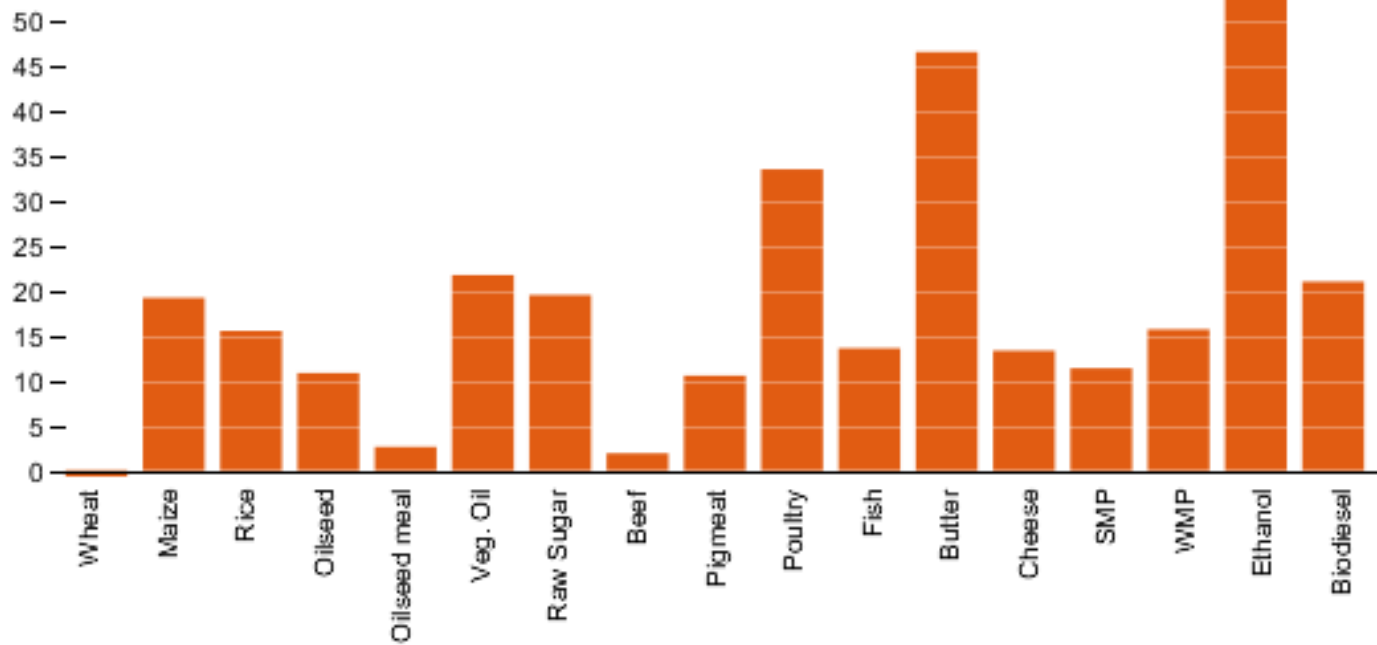
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## Price changes in real terms, % (2011-20 compared to 2001-10)



Source: OECD and FAO



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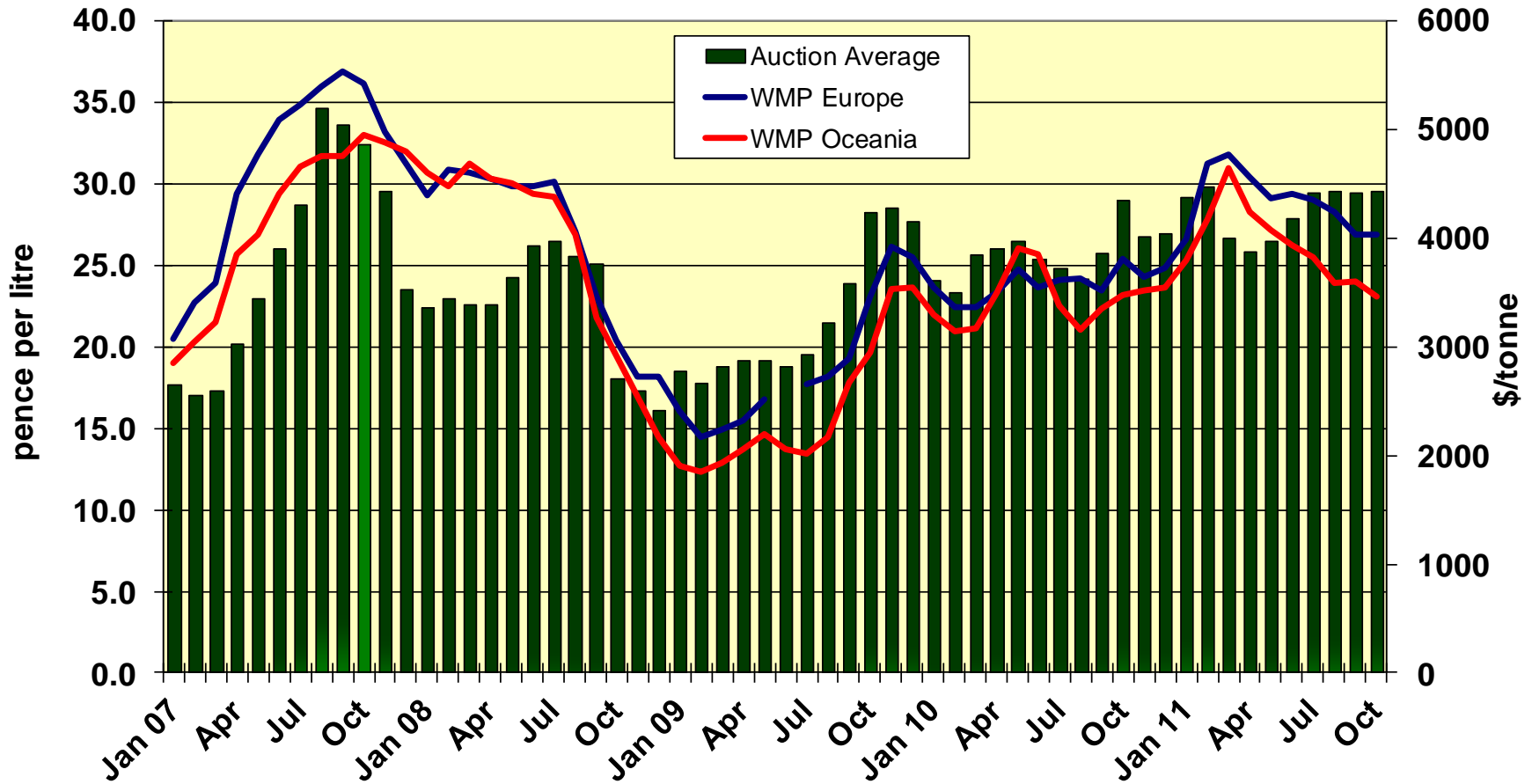
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# UDF Milk Auction & Whole Milk Powder Prices, 2007-2011



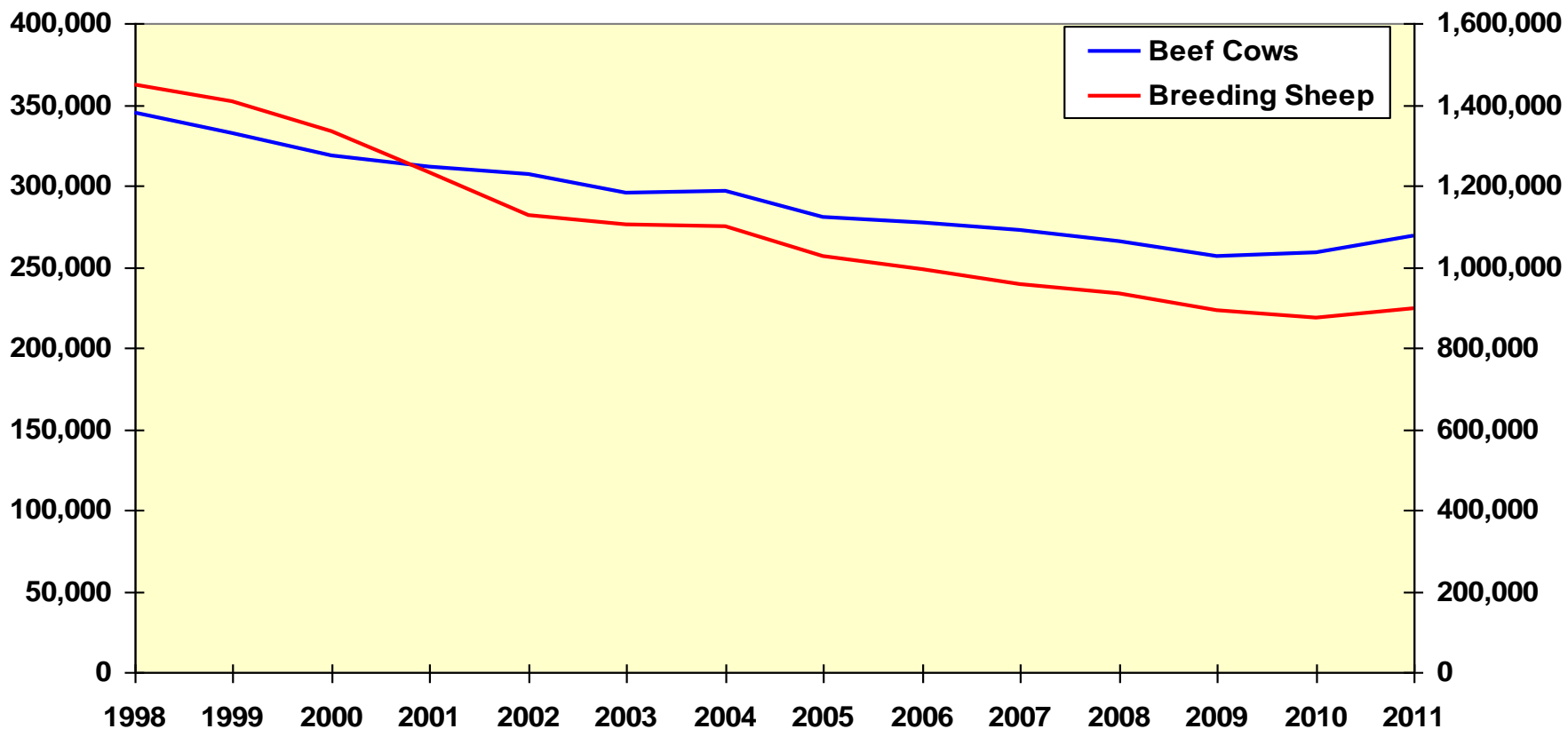
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# Northern Ireland Beef Cow and Sheep Populations



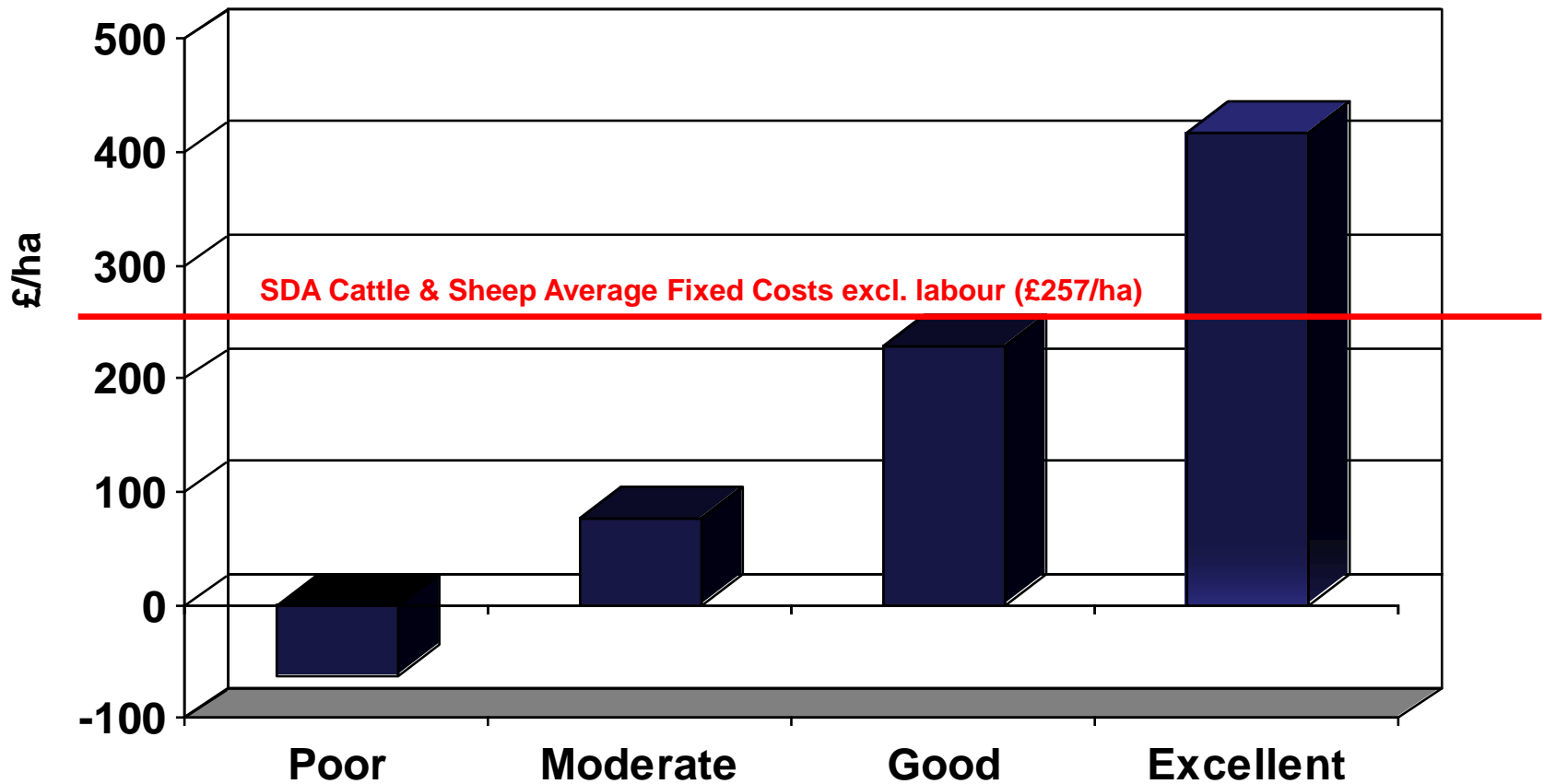
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# SDA Suckler Cow Enterprise Gross Margins (£/ha) 2010/11



Source: DARD Farm Business Survey



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# Restructuring of Suckler and Sheep Sectors

	Suckler Cows		Ewes	
	% of NI herd within:		% of NI flock within:	
	Herds of <15	Herds of >100	Flocks of <50	Flocks of >500
1995	23%	8%	8%	16%
2010	21%	8%	9%	15%



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# Northern Ireland Dairy Production 1995-2010

- **Number of herds** **-40%**
- **Average size of herd** **+72%**
- **Average yield per cow** **+29%**
- **Average milk output per herd (litres)** **+124%**
- **Total volume of milk produced** **+35%**
- **Concentrates fed per litre of milk** **+45%**



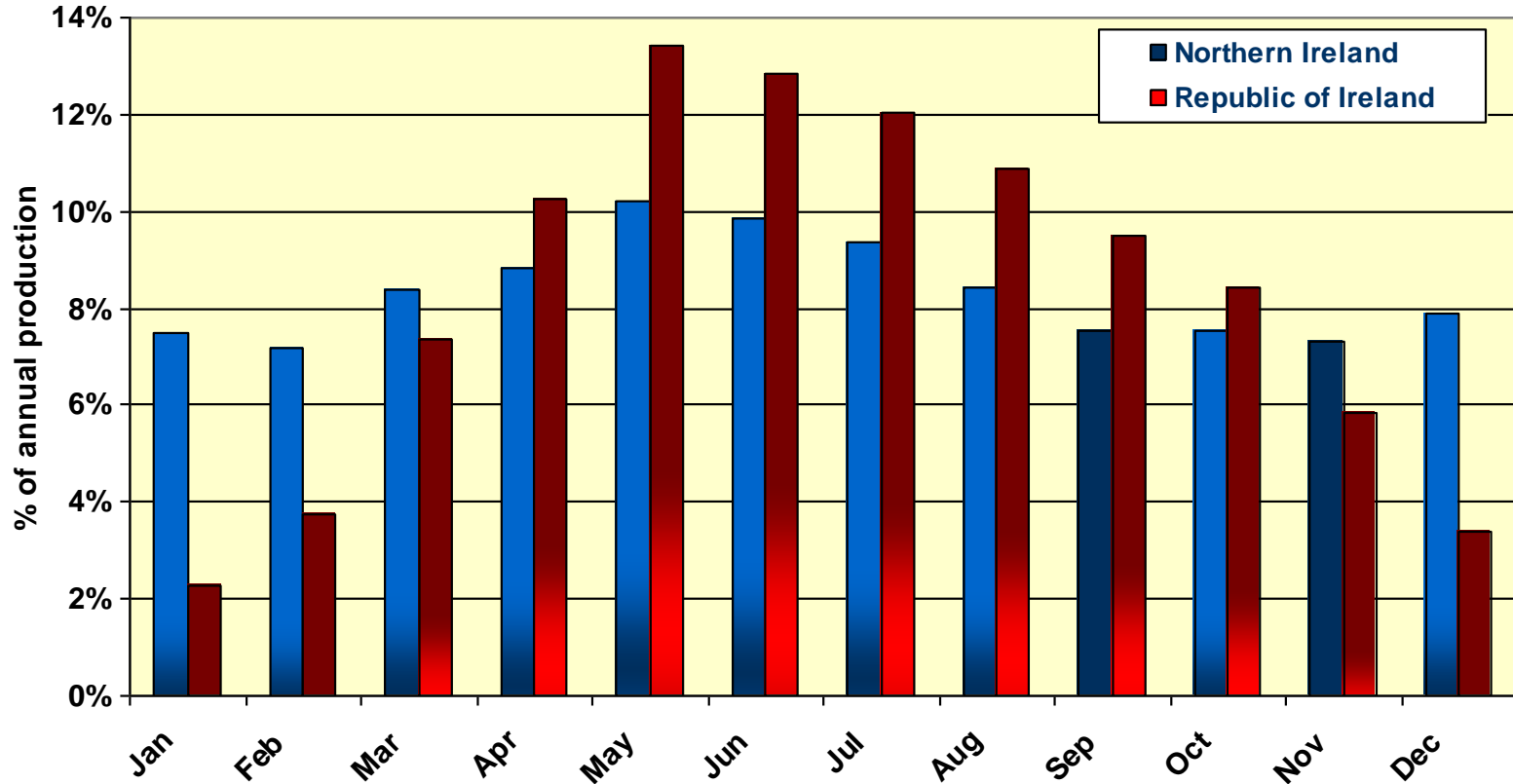
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# Monthly Milk Production Profile 2010



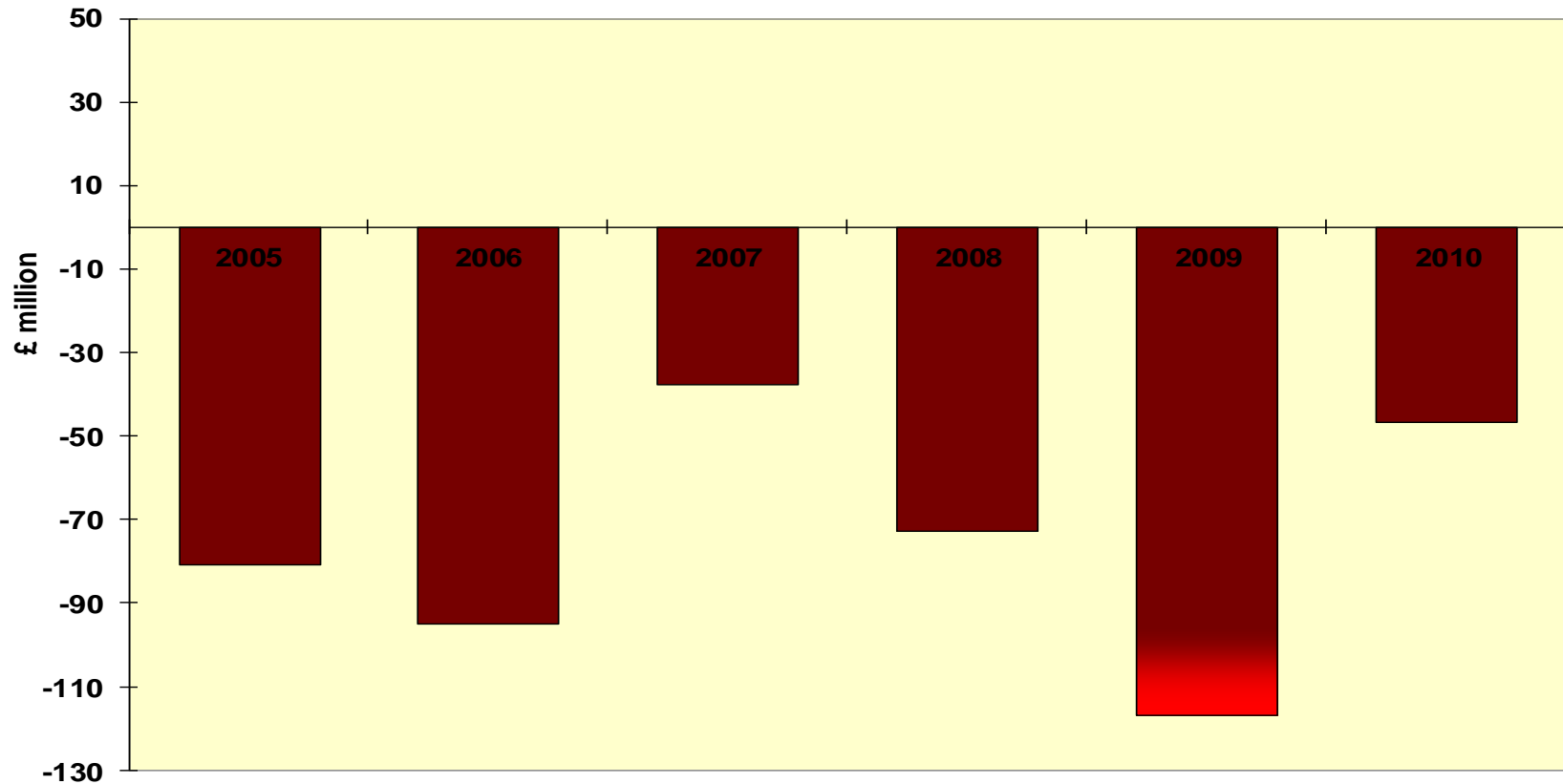
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# Northern Ireland Total Income from Farming Excluding EU Direct Payments, 2005-2010



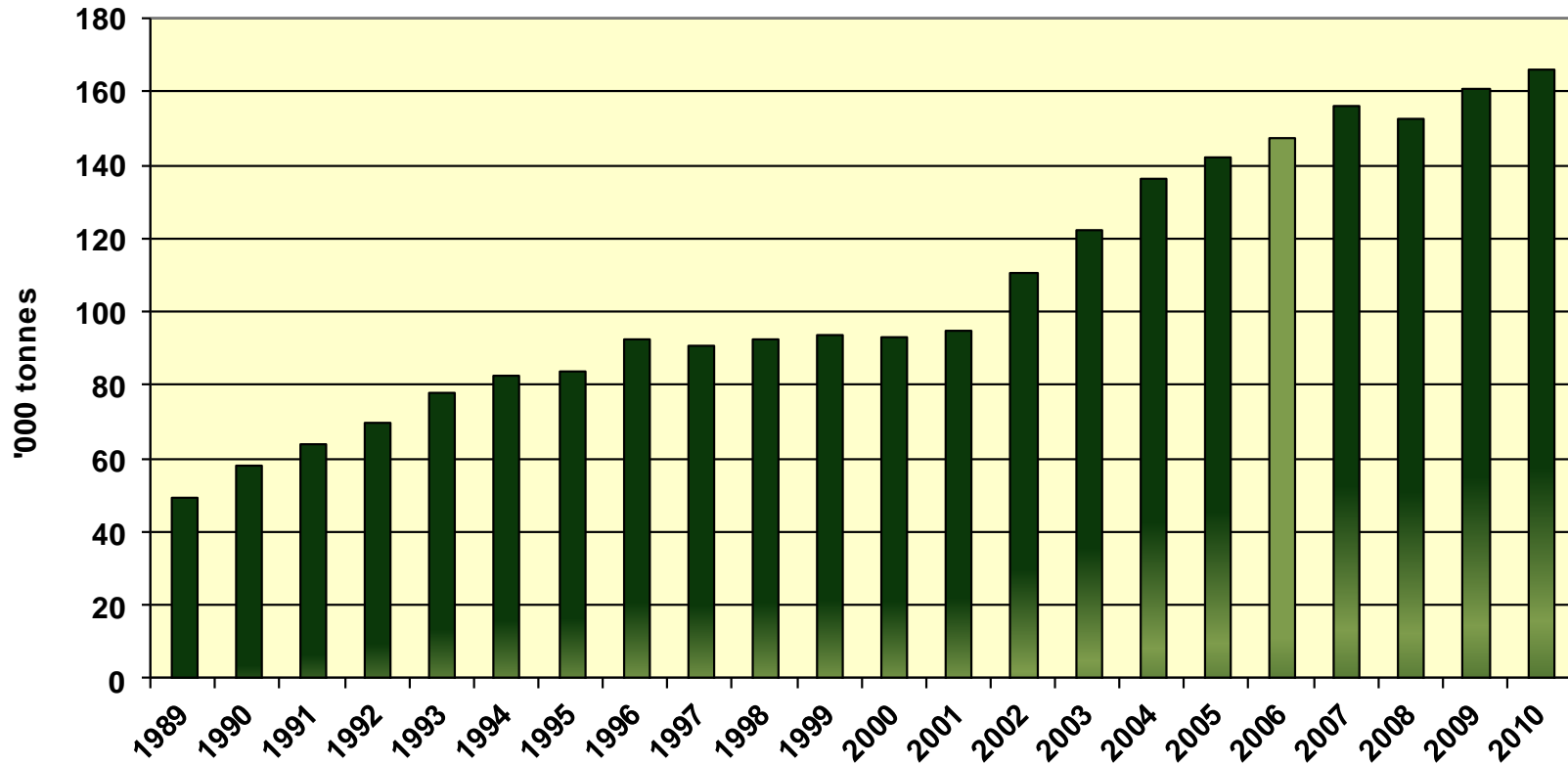
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# Broiler Meat Production in Northern Ireland



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