POLICY, ECONOMICS AND STATISTICS DIVISION

Size and Performance of the Northern Ireland Food and Drinks Processing Sector, Subsector Statistics 2017,

with provisional estimates for 2018

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National Statistics Status

National Statistics status means that our statistics meet the highest standards of trustworthiness, quality and public value, and it is our responsibility to maintain compliance with these standards.

These statistics were designated as National Statistics in June 2013 following a full assessment against the Code of Practice.

Since the assessment by the UK Statistics Authority, we have continued to comply with the Code of Practice for Statistics, and have made the following improvements;

- Redesigned the publication to provide more context to results by setting recent changes within context of longer term trends;
- Removed pre-release access to enhance trustworthiness;
- Provided data files in open source format for accessibility

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KEY FACTS

Gross turnover

1. The total gross turnover of the Northern Ireland food and drinks processing sector is estimated to have increased by 10.6 per cent in 2017 to £4,810 million; an increase of £463 million. In real terms the sector has grown by 60.3 per cent since 2000.
2. Provisional estimates for 2018 indicate it increased by 2.9 per cent to £4,952 million; an increase of £142 million.

Employment

3. Between 2016 and 2017, the estimated level of direct full-time employee equivalents (FTE) in the sector increased by 4.9 per cent, from 22,539 in 2016 to 23,641 in 2017.
4. Provisional estimates for 2018 indicate this trend will continue with a 5.0 per cent increase in the total number of direct FTE to 24,818.

Destination of sales

5. The largest market for the Northern Ireland food and drinks processing sector continues to be Great Britain, valued at £2,377 million in 2017.
6. Export sales, i.e. sales to markets outside of the United Kingdom, increased by 14.7 per cent from £1,099 million in 2016 to £1,264 million in 2017. Republic of Ireland continues to be the largest export market, valued at £716 million in 2017.
7. Between 2016 and 2017 the sectors sales increased across all markets; within Northern Ireland (+£111.0m), to Great Britain (+£189.9m), to the Republic of Ireland (+£71.1m), to other EU countries (+£79.2m) and to the rest of the world (+£14.7m).

Contribution to the Northern Economy[1]

8. Total sales for the Northern Ireland's manufacturing goods were estimated at £14,859 million in 2017. The food and drinks processing sector accounted for 32.4 per cent, an increase from 2016 when it contributed 25.0 per cent of sales.
9. The contribution of the sector to total manufacturing external sales increased from 23.6 per cent in 2016 to 33.1 per cent in 2017. The sector accounted for 21.8 per cent of total manufacturing export sales in 2017; in 2016 it contributed 19.2 per cent.
10. The increase in the sectors share of both total and external sales can be explained by decreasing sales of the manufacturing industry overall; total sales decreased by £2,527 million from 2016.
11. The proportion of total employment within the manufacturing industry increased from 26.8 per cent in 2016 to 28.4 per cent in 2017.

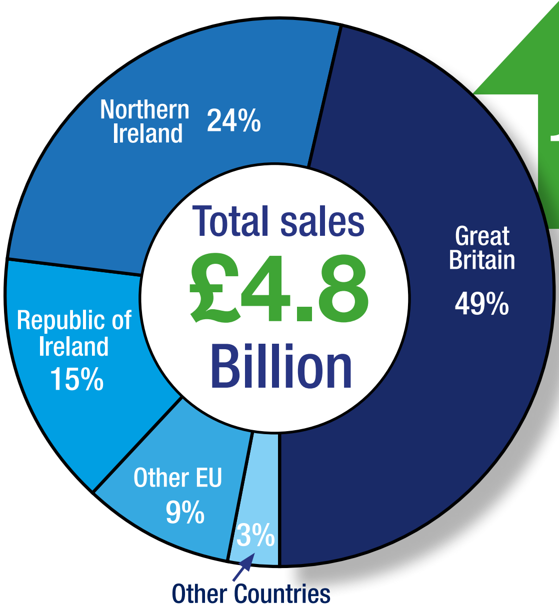
Value added

12. The value added generated by the sector between 2016 and 2017, increased by 9.2 per cent from £828 million to £904 million. The sector accounted for 18.7 per cent of total value added in the manufacturing industry; an increase from 2016 when it contributed 15.8 per cent.

[1] Manufacturing sector data from NISRA publications; 'Northern Ireland Broad Economy Sales & Exports Statistics' published on 19th June 2019, Business Register and Employment Survey published on 27th June 2019 and Annual Business Inquiry published on 21st November 2018. Please note Sales refers to Sales of Goods (excluding Services).

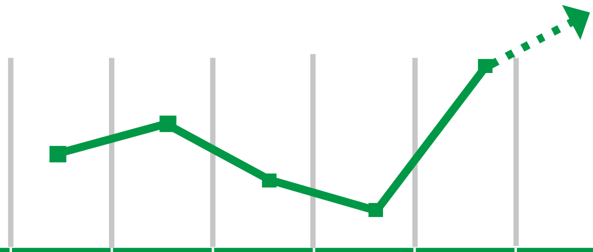
NI's Food and Drinks Processing Sector - 2017

Destination of Sales



Sales up by 11%

Trend over time



Year	2013	2014	2015	2016	2017	2018
Sales	£4.5 Billion	£4.6 Billion	£4.4 Billion	£4.3 Billion	£4.8 Billion	£5 Billion

Provisional estimates suggest the sector will hit £5 Billion in sales in 2018

Employment

up by 5%

23,641 FTE* employees

* Full time Equivalents

Contribution to NI Manufacturing Industry

Value Added

up by 9%

1. INTRODUCTION

Reporting period

This publication contains estimates for the size and performance of the Northern Ireland food and drinks processing sector in 2017, as well as providing revised comparative data for 2016. Also included are provisional estimates of gross turnover and the level of employment in the sector in 2018. The time-lag between 31st December 2018 and the submission of annual company accounts to Companies House meant that a full set of company accounts was not available when this report was being prepared. It is anticipated that the full set of data on the performance of the sector in 2018 will be published in July 2020.

Data sources

A number of data sources have been used to derive the estimates included in this report. The estimates are based mainly on information contained in the annual accounts of businesses in Northern Ireland obtained through Companies House with an annual turnover in excess of £250,000. Other sources of data include the Broad Economy Sales and Exports Statistics, Manufacturing Sales and Exports Survey and the Northern Ireland Annual Business Inquiry conducted by the Northern Ireland Statistics and Research Agency (NISRA), part of the Department of Finance. Information provided by Invest Northern Ireland and divisions within the Department of Agriculture, Environment and Rural Affairs was also used. The minimum business turnover threshold of £250,000 is used mainly because of the difficulty in accessing detailed accounting information for small businesses. Their omission from the study is estimated to have a maximum impact of £50 million on the total gross turnover of the sector, and 500 direct full-time employee equivalents on the level of employment in the sector. The data presented is for those businesses (or the relevant processing sites) which have a processing capacity within Northern Ireland.

Performance Indicators

The main measurements of size used in the analyses are gross turnover, value added and employment. External and export sales demonstrate the dependence of the sector on markets outside of Northern Ireland. Performance is expressed in 15 different ways and includes parameters such as net profits as a percentage of annual turnover and the rate of return on capital employed. These measures of size and indicators of performance are presented for each of the ten food and drinks subsectors and for the whole processing sector. Definitions of terms are given in Annex A.

Definitions

A number of different definitions are available to describe what food and drinks processing encompasses. The definition used for this compilation of statistics includes only those businesses that are involved in processing activities that change the nature of a raw material destined for human consumption. Businesses involved in animal feedstuff manufacture, pet food production, rendering, hide and skin processing and tobacco are not considered to be part of the food and drinks processing sector. This differs from the standard industrial classification (SIC) definition, which is used to compile Government's statistics on the manufacturing industry. It is considered that the definition adopted for this report provides a more useful and practical description of the food and drinks processing sector. Definitions for each of the ten subsectors are given in Annex B.

Throughout this report, the ‘total sector’ estimates refer to the total of the ten food and drinks processing subsectors. This results in a total sector gross turnover of £4,810 million in 2017. On occasions, this aggregation of subsectors may not be appropriate. For example, when figures are required for the food sector only, it may be appropriate to exclude the figure for the drinks subsector. This would result in a gross turnover value of £4,421 million in 2017.

Sample

In total, information for 301 businesses with a turnover greater than £250,000 have been used in the 2017 analyses. This includes 11 new businesses added to the sample while 7 businesses have been removed from the sample. Each of these businesses were allocated, depending on the main product processed, into one of the ten food and drinks subsectors.

Revised Estimates

As a result of better information now being available for a number of businesses, some revisions have been made to the 2016 data as published in the previous report. The differences between the previously published and revised data for 2016 are as follows:

	2016 Original Estimate	2016 Revised Estimate
Total Gross Turnover (£m)	4,365	4,348
Total Value Added (£m)	827	828
Total Exports (£m)	1,108	1,099
Direct Employment (full-time equivalents)	22,413	22,539

The previous report in this series also included provisional estimates of gross turnover and employment in the food and drinks processing sector for 2017, based on a sample of business returns. Revised estimates have now been produced based on a full data set. The provisional and revised estimates are as follows:

	2017 Provisional Estimate	2017 Revised Estimate
Total Gross Turnover (£m)	4,478	4,810
Direct Employment (full-time equivalents)	23,479	23,641

Time Series

A time-series of data for each of the main size and performance indicators for the period 1989 to 2017 (2018 where available) is published on the DAERA website at: Size and performance of the NI food and drinks processing sector

Quality report

A report which describes the quality of the statistics presented in the publication can also be found at: Size and performance of the NI food and drinks processing sector.

Further Information

Comments on the report are always welcome and should be forwarded to the Editor, Philip Hamilton.
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2. SIZE OF THE NORTHERN IRELAND FOOD AND DRINKS PROCESSING SECTOR OVER TIME.

Table 1 Gross turnover and full-time employee equivalents in 2016, 2017 (with provisional estimates for 2018)

	2016	2017	Percentage Change 16/17	Provisional 2018[1]
Gross turnover (£ million)	4,347.2	4,809.7	10.6%	4,951.5
Direct Employees[2] (full time equivalents)	22,539	23,641	4.9%	24,818

1. Provisional estimates for 2018 are based on 73 business returns accounting for approximately one third of the estimated total expenditure and employment in the sector. Revised estimates for 2018 based on business returns for all food and drink processing sector firms will be available in July 2020.
2. Direct employees are those workers on the payroll of the company during the period. Agency workers have been estimated for 2016, 2017 and 2018, please see table 6 for this data.

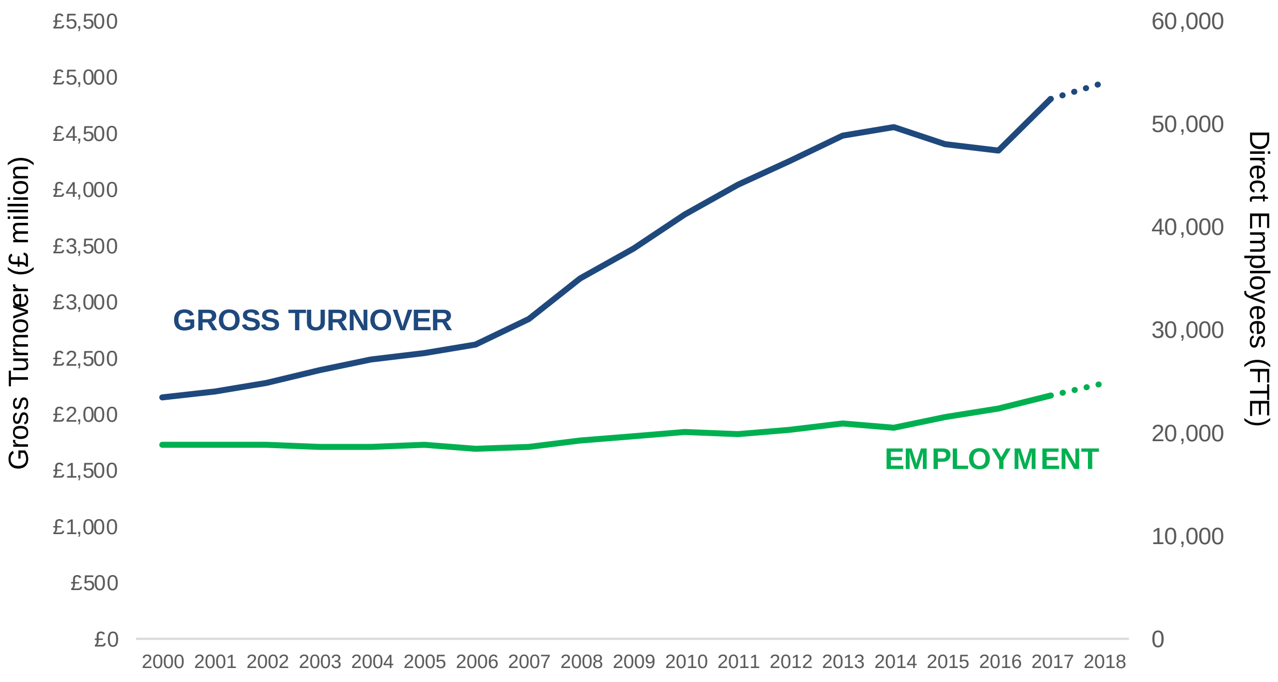
- The gross turnover for the food and drinks processing sector is estimated to have increased from £4,347 million in 2016 to £4,810 million in 2017; an increase of 10.6 per cent.

- When this is expressed in real terms (using the GDP deflator), the increase in gross turnover is 8.3 per cent between 2016 and 2017.

- The number of direct full-time employee equivalents in the food and drinks processing sector is estimated to have increased by 4.9 per cent from 22,539 full-time employee equivalents in 2016 to 23,641 full-time employee equivalents in 2017.

- It is provisionally estimated between 2017 and 2018 that gross turnover will increase by 2.9 per cent to £4,952 million and employment will increase by 5.0 per cent to 24,818.

Figure 1 Gross turnover and Employment 2000 - 2017 (with provisional estimates for 2018)



- After a brief period of decline, gross turnover for the Northern Ireland food and drinks processing sector has returned to growth in 2017 and is estimated to have exceeded the peak level previously set in 2014. The sector is valued at £4,810 million in 2017 (+£245 million compared to 2014).

- This upward trend is estimated to continue in 2018 where the sector is expected to reach sales of £4,952 million.

- When gross turnover in 2017 is adjusted to account for inflation and expressed in real terms, it has increased by 60.3 per cent since 2000 when the sector was valued at £2,876 million.

- The main drivers of growth in 2017 are increasing sales to Great Britain (+£189.9m) and increasing Export Sales (+£161.3m) – particularly to Other EU markets (+£79.2m). This increase in export sales suggests businesses may have benefited from the lower value of sterling exchange rates since 2016.

- The number of direct FTE employees has been steadily increasing since 2014 and reached a record level of 23,641 FTE employees in 2017. This trend is estimated to continue on 2018 when employment is estimated to reach 24,818.

- Between 2000 and 2017 the level of employment in the sector has increased by 25 per cent.

3. SIZE AND MARKETING DESTINATIONS OF THE NORTHERN IRELAND FOOD AND DRINKS PROCESSING SECTOR IN 2016 AND 2017.

Table 2 Gross turnover, by subsector, 2016 and 2017 (with provisional estimates for 2018)

	Gross turnover (£ million) 2016	2017	Percentage Change 16/17	Provisional 2018[1]
Animal By-Products	47.9	53.1	10.9%	44.5
Bakeries	311.5	329.3	5.7%	344.0
Beef and Sheepmeat	1,190.3	1,312.2	10.2%	1,390.5
Drinks	369.2	388.9	5.3%	377.0
Eggs	153.2	175.4	14.5%	144.7
Fish	79.7	94.0	17.9%	99.0
Fruit and Vegetables	321.4	337.0	4.9%	353.3
Milk and Milk Products	876.2	1,067.6	21.8%	1,082.8
Pigmeat	317.7	343.2	8.0%	382.1
Poultrymeat	680.3	709.0	4.2%	733.6
Total Sector	**4,347.2**	**4,809.7**	**10.6%**	**4,951.5**

1. Provisional estimates for 2018 are based on 73 business returns accounting for approximately one third of the estimated total expenditure and employment in the sector.

- All ten subsectors recorded an increase in their levels of gross turnover between 2016 and 2017. The subsectors which experienced the largest increase in total gross turnover between 2016 and 2017 were milk and milk products (+£191.4m) and beef and sheep meat (+£121.9m).

- Milk and milk products (+21.8%), fish (+17.9%) and eggs (+14.5%) recorded the largest increases in the proportion of gross turnover between 2016 and 2017.

- Beef and sheepmeat, and milk and milk products continue to be the largest subsectors in terms of gross turnover; accounting for 47.6 per cent of the total gross turnover of the food and drinks processing sector in 2016 and 49.5 per cent in 2017.

- The food and drinks processing sector is estimated to have accounted for 32.4 per cent of Northern Ireland's total manufacturing sales[2] in 2017.

- It is provisionally estimated that gross turnover will increase by 2.9 per cent to £4,952 million in 2018.

[2] Manufacturing sector data from the DOF publication "Northern Ireland Broad Economy Sales & Exports Statistics 2017" published on 27th June 2019. Please note Sales refers to Sales of Goods (excluding Services).

Table 3 Number of businesses within each annual turnover bracket for all sectors, 2016 and 2017

Gross Turnover Bracket	Number of businesses 2016	2017	Change (Number of businesses)
£250k > £1m	92	98	+6
£1m > £10m	142	139	-3
£10m > £50m	43	41	-2
> £50m	20	23	+3
Total Sector	**297**	**301**	**+4**

- The food and drinks processing sector had 301 businesses in 2017 with a turnover of more than £250,000; three more than in 2016.
- There were 64 businesses in the food and drinks processing sector in 2017 with an annual turnover of more than £10 million; one more than in 2016.
- In 2017, there were 23 business with an annual turnover in excess of £50 million in the food and drinks processing sector; three more than in 2015. These 23 businesses accounted for 70.9 per cent of total turnover, 61.9 per cent of total value added and 56.0 per cent of total employment in the sector.

Figure 2 ***Number of businesses within each subsector, grouped by annual turnover bracket, 2017***

Gradient colouring used to avoid disclosure of categories less than 5

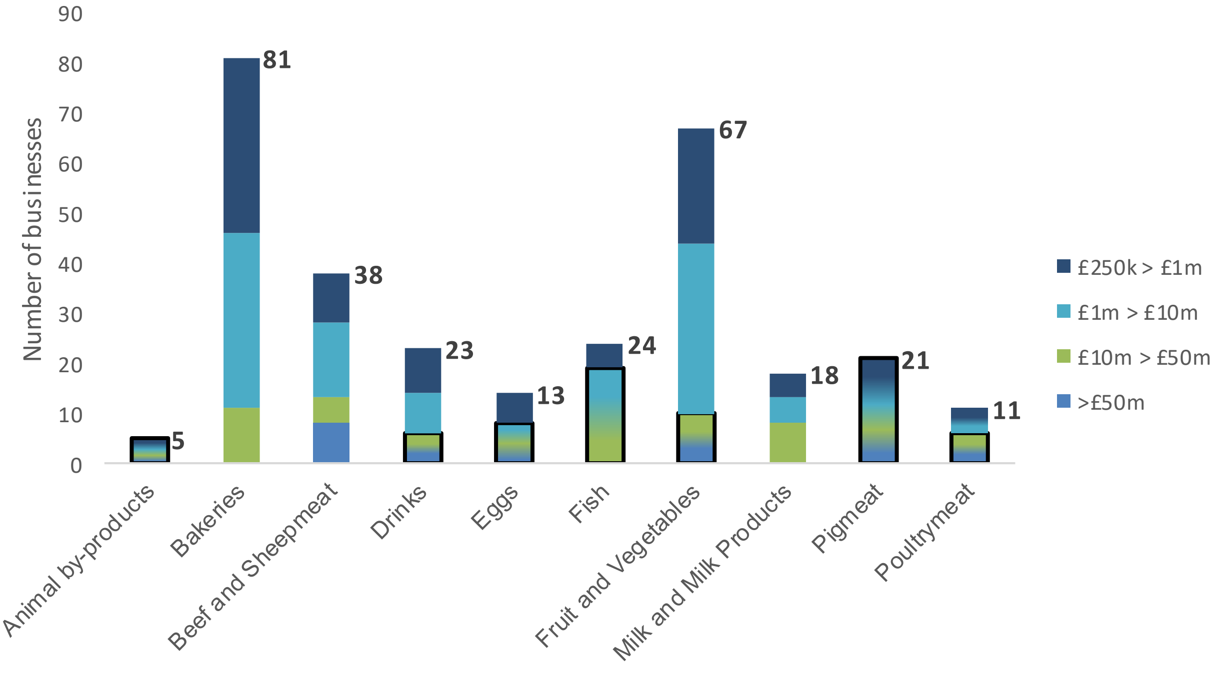
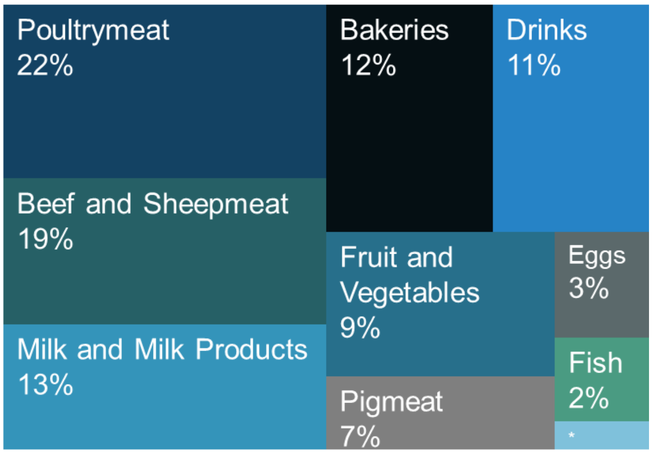


Table 4 Value added, by subsector, 2016 and 2017

	Value Added (£ million) 2016	2017	Change (%)
Animal By-Products	8.6	10.9	26.4%
Bakeries	108.0	111.3	3.0%
Beef and Sheepmeat	159.2	172.1	8.1%
Drinks	97.9	101.9	4.0%
Eggs	26.6	28.8	8.3%
Fish	17.0	18.1	6.3%
Fruit and Vegetables	81.2	84.1	3.6%
Milk and Milk Products	103.9	116.9	12.5%
Pigmeat	49.4	58.7	18.8%
Poultrymeat	176.3	201.2	14.1%
Total Sector	**828.1**	**904.0**	**9.2%**

- Value added is a key indicator of the contribution made by a subsector or sector to the economy. The value added generated by the food and drinks processing sector increased from 2.2 per cent of the Northern Ireland total in 2016 to 2.3 per cent in 2017.
- In 2017, the value added by the sector was estimated to be £904 million; an increase of 9.2 per cent from the revised figure of £828 million in 2016.
- The value added by the three largest subsectors poultrymeat (£201.2m), beef and sheepmeat (£172.1m), and milk and milk products (£116.9m) accounted for 54.2 per cent of the sector in 2017. This compares to the 53.5 per cent share held by the three largest subsectors in 2016 - poultrymeat (£176.3m), beef and sheepmeat (£159.2m) and bakeries (£108.0m).
- Value added accounted for 18.8 per cent of the total gross turnover of the food and drinks processing sector in 2016; a decrease from 19.0 per cent in 2016.

Figure 4[3] Percentage of Value added by subsector, 2017



* Animal by-products 1%

[3] Due to rounding figures may not add to 100 per cent.

Table 5a Components of value added for each subsector, 2016

	Value added (£ million)				
	Wages and salaries	**Depreciation charge**	**Net profit**	**Interest paid**	**Value added**
Animal By-Products	3.6	0.5	4.5	0.1	8.6
Bakeries	86.2	6.5	13.8	1.5	108.0
Beef and Sheepmeat	112.2	12.9	30.8	3.3	159.2
Drinks	51.1	18.7	17.7	10.5	97.9
Eggs	7.5	3.6	15.4	0.1	26.6
Fish	11.3	1.6	3.8	0.3	17.0
Fruit and Vegetables	51.7	11.0	16.9	1.5	81.2
Milk and Milk Products	60.0	14.8	27.6	1.5	103.9
Pigmeat	29.0	2.9	17.3	0.2	49.4
Poultrymeat	132.9	12.8	27.5	3.0	176.3
Total Sector	**545.5**	**85.4**	**175.3**	**21.9**	**828.1**

Table 5b Components of value added for each subsector, 2017

	Value added (£ million)				
	Wages and salaries	**Depreciation charge**	**Net profit**	**Interest paid**	**Value added**
Animal By-Products	4.0	1.1	5.8	0.1	10.9
Bakeries	86.7	6.8	16.0	1.8	111.3
Beef and Sheepmeat	125.3	15.7	27.9	3.2	172.1
Drinks	51.5	19.6	22.4	8.3	101.9
Eggs	8.7	5.4	14.6	0.1	28.8
Fish	12.0	2.0	3.8	0.3	18.1
Fruit and Vegetables	54.4	9.8	18.3	1.6	84.1
Milk and Milk Products	63.8	16.8	34.5	1.7	116.9
Pigmeat	36.2	2.3	20.1	0.1	58.7
Poultrymeat	137.0	14.7	46.8	2.8	201.2
Total Sector	**579.5**	**94.2**	**210.3**	**20.1**	**904.0**

- Between 2016 and 2017, three of the four components of value added increased, with the largest increase occurring in net profit (+£35.0m).
- The largest contributions toward value added in the sector in 2017 were from wages and salaries (64.1 per cent) and net profit (23.3 per cent).
- All ten subsectors recorded an increase in wages and salaries between 2016 and 2017, the largest of which was in the beef and sheepmeat subsector (+£13.1m).
- Seven of the ten subsectors recorded an increase in net profit between 2016 and 2017. The poultrymeat subsector (+£19.3m) recorded the largest increase in net profit. The beef and sheepmeat subsector (-£2.8m) experienced the largest decrease.

Table 6 Direct full-time employee equivalents, by subsector, and total agency workers in 2016 and 2017 (with provisional estimates for 2018)

	Employees (FTE[1])		Percentage Change	Provisional
	2016	2017	16/17	2018
Animal By-Products	115	112	-2.6%	109
Bakeries	3,823	3,936	2.9%	4,195
Beef and Sheepmeat	5,081	5,116	0.7%	5,337
Drinks	1,328	1,295	-2.4%	1,326
Eggs	378	418	10.7%	318
Fish	596	643	7.9%	643
Fruit and Vegetables	2,508	2,537	1.2%	2,789
Milk and Milk Products	1,954	2,222	13.7%	1,999
Pigmeat	1,528	1,725	12.9%	1,484
Poultrymeat	5,230	5,639	7.8%	6,621
Total Sector	**22,539**	**23,641**	**4.9%**	**24,818**
Agency Employment	**2,599**	**2,785**	**7.2%**	**2,793**

1. Direct employees are those workers on the payroll of the company during the period. Agency workers have been estimated for 2016 and 2017. They are not included in regional manufacturing employment figures as they are recorded as employment in the services sector.

- In 2017, direct employment in the food and drinks processing sector increased to 23,641 full-time employee equivalents; an increase of 1,102 full-time employee equivalents.

- Eight of the ten subsectors recorded an increase in the number of direct full-time employee equivalents between 2016 and 2017. The three largest increases were recorded in poultrymeat (+409 FTEs), milk and milk products (+268 FTEs) and pigmeat (+197 FTEs) subsectors.

- Poultrymeat (5,639 FTEs), beef and sheepmeat (5,116 FTEs), and bakeries (3,936 FTEs) subsectors accounted for 62.1 per cent of the total direct employment in the food and drinks processing sector in 2017.

- The food and drinks processing sector in 2017 accounted for 30 per cent of Northern Ireland's total manufacturing employment[4]; an increase of 2 percentage point from 2016.

- In 2017, it is estimated that in addition to direct employees, the sector sourced a further 2,785 full-time employee equivalents from Employment Agencies. This is an increase of 7.2 per cent from 2016 levels. It would not be appropriate to include these in any manufacturing industry analysis (see note 1 for Table 6).

[4] Manufacturing sector data from the NISRA publication "Business Register and Employment Survey" published on 27th June 2019.

Table 7 Total sales by country of destination, 2016 and 2017

	Sales (£ million and percent of total sales)			
	2016	Percentage of total sales	2017	Percentage of total sales
Northern Ireland	1,056.8	24.3%	1,167.8	24.3%
Great Britain	2,188.1	50.3%	2,377.1	49.4%
Republic of Ireland	644.9	14.8%	716.0	14.9%
Other EU	336.9	7.7%	416.1	8.7%
Rest of World	117.2	2.7%	131.9	2.7%
Intervention[5]	3.4	0.1%	0.9	0.0%
Total Sales	**4,347.2**	**100.0%**	**4,809.7**	**100.0%**
External Sales	3,287.1	75.6%	3,641.1	75.7%
Export Sales	1,099.0	25.3%	1,264.0	26.3%

- Between 2016 and 2017, sales in the food and drinks processing sector to destinations outside of Northern Ireland (External Sales) increased from £3,287 million to £3,641 million.

- There was little variance in the proportion of total sales to external markets from 75.6 per cent of the sector's total sales in 2016 to 75.7 per cent in 2017.

- The largest market for the Northern Ireland food and drinks processing sector continues to be Great Britain. From 2016 to 2017, sales to this market increased by 8.6 per cent from £2,188 million to £2,337 million. The proportion of total sales to Great Britain decreased by 0.9 percentage points from 50.3 per cent in 2016 to 49.4 per cent in 2017.

- Export sales, i.e. sales to markets outside of the United Kingdom, increased by 15.0 per cent from £1,099 million in 2016 to £1,264 million in 2017. Sales in the food and drinks processing sector to export markets accounted for 26.3 per cent of total sales in 2017.

- The largest export market continues to be the Republic of Ireland, which recorded a 11.0 per cent increase in sales from £645 million in 2016 to £716 million in 2017. The Republic of Ireland market accounted for 14.9 per cent of the total sales in the food and drinks processing sector in both 2016 and 2017.

- In 2016, the contribution that the food and drinks processing sector made to total manufacturing external sales[6] increased from 23.6 per cent in 2016 to 33.1 per cent in 2017.

- The sector accounted for 21.8 per cent of Northern Ireland's total manufacturing export sales in 2017; an increase of 2.6 percentage points from 2016.

[5] This refers to a number of policy instruments and market tools available in the dairy sector to provide a safety net in case of serious market imbalance.
[6] Manufacturing sector data from the DOF publication Northern Ireland Broad Economy Sales & Exports Statistics 2017" published on 19th June 2019. Please note Sales refers to Sales of Goods (excluding Services).

Table 8a Destinations and values of subsector sales, 2016

(£ million)

	NI[1]	GB[2]	ROI[3]	Other[4] EU	ROW[5]	Inter-vention	Total Sales	External[6] Sales	Export[7] Sales
Animal By-Products	*	*	*	*	*	0.0	**47.9**	*	*
Bakeries	159.1	59.8	89.3	0.7	2.6	0.0	**311.5**	152.4	92.7
Beef/Sheepmeat	155.0	814.8	83.1	122.3	15.1	0.0	**1,190.3**	1,035.3	220.5
Drinks	152.3	34.7	156.8	12.6	12.9	0.0	**369.2**	216.9	182.2
Eggs	47.3	92.8	*	*	0.0	0.0	**153.2**	105.8	13.0
Fish	12.8	35.8	6.5	21.5	3.1	0.0	**79.7**	66.9	31.1
Fruit/Vegetables	103.5	162.1	53.7	0.9	1.2	0.0	**321.4**	217.9	55.7
Milk/Milk Products	240.3	323.1	107.0	149.6	52.8	3.4	**876.2**	632.5	309.4
Pigmeat	124.8	121.7	56.4	*	*	0.0	**317.7**	192.8	71.2
Poultrymeat	*	*	75.6	*	*	0.0	**680.3**	*	*
Total	**1,056.8**	**2,188.1**	**644.9**	**336.9**	**117.2**	**3.4**	**4,347.2**	**3,287.1**	**1,099.0**

Table 8b Destinations and values of subsector sales, 2017

(£ million)

	NI[1]	GB[2]	ROI[3]	Other[4] EU	ROW[5]	Inter-vention	Total Sales	External[6] Sales	Export[7] Sales
Animal By-Products	*	*	*	*	*	0.0	**53.1**	*	*
Bakeries	164.3	66.2	95.5	0.7	2.6	0.0	**329.3**	165.0	98.8
Beef/Sheepmeat	161.3	927.6	85.3	125.2	12.7	0.0	**1,312.2**	1,150.8	223.3
Drinks	160.7	32.9	170.5	13.1	11.7	0.0	**388.9**	228.2	195.3
Eggs	56.5	106.0	*	*	0.0	0.0	**175.4**	118.9	12.9
Fish	13.6	45.6	7.2	24.2	3.4	0.0	**94.0**	80.4	34.8
Fruit/Vegetables	113.8	159.7	61.4	0.8	1.3	0.0	**337.0**	223.3	63.6
Milk/Milk Products	290.4	363.6	128.6	*	*	0.9	**1,067.6**	776.3	412.7
Pigmeat	141.8	111.1	72.6	*	*	0.0	**343.2**	201.4	90.3
Poultrymeat	*	*	79.5	*	*	0.0	**709.0**	*	*
Total	**1,167.8**	**2,377.1**	**716.0**	**416.1**	**131.9**	**0.9**	**4,809.7**	**3,641.1**	**1,264.0**

*Information has been suppressed to avoid disclosure.
1. Northern Ireland 2. Great Britain 3. Republic of Ireland 4. Other European Union
5. Rest of World 6. Sales outside NI 7. Sales outside UK

- In both 2016 and 2017 Great Britain was the largest market for six out of the ten subsectors.

- In 2017, the subsectors most reliant on markets outside of Northern Ireland, i.e. external markets, were the animal by-products, poultrymeat, beef and sheepmeat and fish subsectors. The bakeries subsector had the least reliance on external markets.

- The subsectors in 2017 most reliant on markets outside of the United Kingdom, i.e. export markets, were the animal by-products, drinks and milk and milk products subsectors. The least reliant were the eggs and poultrymeat sub-sectors.

- The Republic of Ireland remains the largest export market for the food and drinks processing sector and accounted for 56.6 per cent of exports. The market represents 43.8 per cent of the total sales in the drinks subsector and 29.0 per cent in the bakeries subsector.

Table 9 Capital employed, by subsector, 2016 and 2017

	Capital employed (£ million)	
	2016	**2017**
Animal By-Products	17.8	13.4
Bakeries	86.8	97.0
Beef and Sheepmeat	276.7	268.3
Drinks	417.8	464.8
Eggs	63.4	68.5
Fish	30.9	34.7
Fruit and Vegetables	139.6	149.6
Milk and Milk Products	315.6	336.8
Pigmeat	87.5	96.5
Poultrymeat	310.9	328.7
Total Sector	**1,747.0**	**1,858.4**

- The amount of capital employed in the food and drinks processing sector increased by approximately £111 million between 2016 and 2017, from £1,747 million to £1,858 million.

- In 2017, the largest volumes of capital employed were recorded in the drinks (£464.8m), milk and milk products (£336.8m) and poultrymeat (£328.7m) subsectors. Together, the three largest subsectors in 2017 accounted for 60.8 per cent of total capital employed compared to 59.8 per cent for the same three largest subsectors in 2016.

- From 2016 to 2017, an increase in the total capital employed was recorded in eight of the ten subsectors. The drinks (+£47.0m) and milk and milk products (+£21.3m) subsectors recorded the largest increases.

- Beef and sheepmeat, experienced the largest decrease of total capital employed by £8.3 million between 2016 and 2017.

- In 2017, the average rate of return on capital employed in the food and drinks processing sector was 12.4 per cent, an increase from 11.3 per cent in 2016.

- The drinks subsector continued to have the largest amount of capital employed per direct full-time employee equivalent with £358,948 in 2017, whilst bakeries had the lowest at £24,648.

- In 2017, the beef and sheepmeat subsector had the lowest level of capital employed per £1,000 of sales, whilst the drinks subsector was again the highest.

Table 10 Contribution made by the 10 largest businesses for each variable towards the food and drinks processing sector in Northern Ireland

	2016	2017
The 10 largest businesses for **gross turnover** as a percentage of total gross turnover of the food and drinks processing sector	49	51
The 10 largest businesses for **value added** as a percentage of total value added of the food and drinks processing sector	47	48
The 10 largest businesses for **direct employment** as a percentage of total direct employment provided by the food and drinks processing sector	46	46

- In 2017, 51 per cent of total gross turnover, 48 per cent of total value added and 46 per cent of total direct employment was accounted for by the ten largest companies for each variable.

- Between 2016 and 2017, the contribution of the ten largest businesses to total gross turnover increased by two percentage points and total value added increased by one percentage point. The contribution to total direct employment remained the same.

2. FOOD AND DRINKS SECTOR PERFORMANCE INDICATORS IN 2016 AND 2017.

Table 11a Average performance indicators for the 10 food and drinks, 2016

	Animal by-products	Bakeries	Beef and Sheepmeat	Drinks	Eggs	Fish	Fruit and Vegetables	Milk and Milk Products	Pigmeat	Poultrymeat	Average
Sales per employee (£)	416,322	81,479	234,283	278,103	405,706	133,856	128,140	448,403	207,910	130,079	192,877
Value added per employee (£)	75,000	28,250	31,327	73,760	70,537	28,616	32,379	53,170	32,322	33,708	36,743
Total capital per employee (£)	155,026	22,706	54,456	314,733	167,905	51,960	55,648	161,501	57,243	59,451	77,508
Average wage cost per employee (£)	31,313	22,535	22,078	38,462	19,913	19,004	20,629	30,694	18,980	25,419	24,201
Gross profit as a percentage of sales	21.9	29.3	9.6	20.5	18.6	17.0	24.6	14.3	13.6	13.1	15.4
Net profit as a percentage of sales	9.3	4.4	2.6	4.8	10.1	4.8	5.3	3.2	5.5	4.0	4.0
Value added as a percentage of sales	18.0	34.7	13.4	26.5	17.4	21.4	25.3	11.9	15.5	25.9	19.0
Wages and salaries as a percentage of sales	7.5	27.7	9.4	13.8	4.9	14.2	16.1	6.8	9.1	19.5	12.5
Interest costs as a percentage of sales	0.1	0.5	0.3	2.8	0.1	0.4	0.5	0.2	0.1	0.4	0.5
Sales per £1,000 wages	13,295	3,616	10,612	7,231	20,374	7,043	6,212	14,609	10,954	5,117	7,970
Value added per £1,000 wages	2,395	1,254	1,419	1,918	3,542	1,506	1,570	1,732	1,703	1,326	1,518
Interest costs as a percentage of gross profit	0.5	1.7	2.9	13.9	0.3	2.2	1.9	1.2	0.4	3.4	3.3
Interest costs as a percentage of net profit	1.1	11.2	10.7	59.5	0.5	7.7	8.8	5.4	1.0	10.9	12.5
Rate of return on captial employed (per cent)	25.3	17.6	12.3	6.7	24.5	13.4	13.2	9.2	20.0	9.8	11.3
Capital employed per £1,000 of sales	372	279	232	1132	414	388	434	360	275	457	402

Time-series data on gross turnover, 1989 to 2017 inclusive, are available on the DAERA website at: DAERA

Table 11b Average performance indicators for the 10 food and drinks processing subsectors, 2017

	Animal by-products	Bakeries	Beef and Sheepmeat	Drinks	Eggs	Fish	Fruit and Vegetables	Milk and Milk Products	Pigmeat	Poultrymeat	Average
Sales per employee (£)	474,045	83,674	256,513	300,300	419,579	146,291	132,844	480,477	199,005	125,740	203,448
Value added per employee (£)	97,321	28,276	33,644	78,652	68,999	28,206	33,151	52,607	34,018	35,685	38,238
Total capital per employee (£)	120,071	24,648	52,454	358,948	163,969	53,944	58,949	151,588	55,950	58,299	78,610
Average wage cost per employee (£)	35,973	22,029	24,488	39,744	20,897	18,624	21,423	28,722	20,970	24,288	24,511
Gross profit as a percentage of sales	22.0	26.5	9.7	20.5	20.2	16.3	23.9	15.3	15.6	13.1	15.5
Net profit as a percentage of sales	10.8	4.9	2.1	5.8	8.3	4.1	5.4	3.2	5.9	6.6	4.4
Value added as a percentage of sales	20.5	33.8	13.1	26.2	16.4	19.3	25.0	10.9	17.1	28.4	18.8
Wages and salaries as a percentage of sales	7.6	26.3	9.5	13.2	5.0	12.7	16.1	6.0	10.5	19.3	12.0
Interest costs as a percentage of sales	0.1	0.6	0.2	2.1	0.0	0.3	0.5	0.2	0.0	0.4	0.4
Sales per £1,000 wages	13,178	3,798	10,475	7,556	20,079	7,855	6,201	16,729	9,490	5,177	8,300
Value added per £1,000 wages	2,705	1,284	1,374	1,979	3,302	1,515	1,547	1,832	1,622	1,469	1,560
Interest costs as a percentage of gross profit	0.5	2.1	2.6	10.5	0.2	2.1	2.0	1.1	0.1	3.0	2.7
Interest costs as a percentage of net profit	1.0	11.5	11.6	37.2	0.6	8.4	8.6	5.0	0.3	5.9	9.5
Rate of return on capital employed (per cent)	43.2	18.4	11.6	6.6	21.4	12.0	13.3	10.8	20.9	15.1	12.4
Capital employed per £1,000 of sales	253	295	204	1195	391	369	444	315	281	464	386

Time-series data on gross turnover, 1989 to 2017 inclusive, are available on the DAERA website at: DAERA

Table 12a Sales per direct employee, by subsector, 2017

	Sales (£ per employee)		
	Minimum[1]	Maximum[1]	Average[2]
Animal By-Products	163,121	382,806	474,045
Bakeries	34,174	107,260	83,674
Beef and Sheepmeat	72,450	385,495	256,513
Drinks	54,530	261,927	300,300
Eggs	258,200	447,962	419,579
Fish	87,174	266,000	146,291
Fruit and Vegetables	52,000	279,850	132,844
Milk and Milk Products	54,857	593,663	480,477
Pigmeat	73,787	334,545	199,005
Poultrymeat	56,500	158,400	125,740
Total Sector	**34,174**	**593,663**	**203,448**

1. The minimum and maximum values refer to the lower and upper limits of the range in values for 80 per cent of the businesses (i.e. the 10 per cent lowest and 10 per cent highest values are excluded).
2. This is the average value for all businesses in each subsector.

- In 2017, the average sales per direct employee in the food and drinks processing sector was £203,448, an increase of 5.5 per cent from 2016 average of £192,877.

- The milk and milk products subsector in 2017 had the highest average level of sales per direct employee at £480,477.

- In 2017, the bakeries subsector had the lowest average level of sales per direct employee at £83,674.

Table 12b Subsectors with high, medium and low average sales per direct employee

High (>£400,000)	Medium (£180,000 to £400,000)	Low (<£180,000)
Animal By-Products	Beef and Sheepmeat	Bakeries
Eggs	Drinks	Fish
Milk and Milk Products	Pigmeat	Fruit and Vegetables
		Poultrymeat

Table 13 Value added per direct employee, by subsector, 2017

	Value added (£ per employee)		
	Minimum[1]	Maximum[1]	Average[2]
Animal By-Products	70,237	141,818	97,321
Bakeries	16,400	38,450	28,276
Beef and Sheepmeat	14,000	44,814	33,644
Drinks	19,111	90,060	78,652
Eggs	34,923	99,650	68,999
Fish	14,588	50,795	28,206
Fruit and Vegetables	15,888	49,529	33,151
Milk and Milk Products	17,083	71,873	52,607
Pigmeat	22,203	43,500	34,018
Poultrymeat	21,250	36,479	35,685
Total Sector	**14,000**	**141,818**	**38,238**

1. The minimum and maximum values refer to the lower and upper limits of the range in values for 80 per cent of the businesses (i.e. the 10 per cent lowest and 10 per cent highest values are excluded).
2. This is the average value for all businesses in each subsector.

- Between 2016 and 2017, the average level of value added per direct employee increased by 4.1 per cent from £36,743 to £38,238.
- In 2017, the animal by-products had the highest average level of value added per direct employee with a value of £97,321.
- The lowest average level of value added per direct employee in 2017 was recorded in the fish subsector with a value of £28,206.

Table 13b Subsectors with high, medium and low average value added per direct employee

High (>£45,000)	**Medium** (£32,000 to £45,000)	**Low** (<£32,000)
Animal By-Products	Fruit and Vegetables	Bakeries
Drinks	Pigmeat	Fish
Eggs	Poultrymeat	
Milk and Milk Products	Beef and Sheepmeat	

Table 14a Total capital employed per direct employee, by subsector, 2017

	Total capital employed (£ per employee)		
	Minimum[1]	Maximum[1]	Average[2]
Animal By-Products	52,400	153,258	120,071
Bakeries	2,222	46,778	24,648
Beef and Sheepmeat	4,043	117,333	52,454
Drinks	19,636	220,333	358,948
Eggs	38,500	236,333	163,969
Fish	22,050	104,945	53,944
Fruit and Vegetables	7,833	119,333	58,949
Milk and Milk Products	13,167	205,875	151,588
Pigmeat	15,250	122,400	55,950
Poultrymeat	23,561	74,452	58,299
Total Sector	**2,222**	**236,333**	**78,610**

1. The minimum and maximum values refer to the lower and upper limits of the range in values for 80 per cent of the businesses (i.e. the 10 per cent lowest and 10 per cent highest values are excluded).
2. This is the average value for all businesses in each subsector.

- Between 2016 and 2017, the average level of capital employed per direct employee in the food and drinks processing sector increased by 1.4 per cent, from £77,508 to £78,610.

- The highest average level of capital employed per direct employee in 2017 was in the drinks subsector (£358,948).

- In 2017, the bakeries subsector (£24,648) had the lowest average level of capital employed per direct employee of the ten subsectors.

Table 14b Subsectors with high, medium and low average total capital employed per direct employee

High (>£120,000)	Medium (£55,000 to £120,000)	Low (<£55,000)
Drinks	Fruit and Vegetables	Bakeries
Eggs	Poultrymeat	Beef and Sheepmeat
Milk and Milk Products	Pigmeat	Fish
Animal By-Products		

Table 15a Average wages and salaries cost per direct FTE employee, by subsector, 2017

	Wages and Salaries Cost (£ per employee)[1]		
	Minimum[2]	Maximum[2]	Average[3]
Animal By-Products	28,636	41,677	35,973
Bakeries	15,000	25,806	22,029
Beef and Sheepmeat	15,167	27,598	24,488
Drinks	15,000	45,765	39,744
Eggs	16,604	27,004	20,897
Fish	15,053	28,615	18,624
Fruit and Vegetables	15,000	25,069	21,423
Milk and Milk Products	16,000	30,769	28,722
Pigmeat	16,375	22,630	20,970
Poultrymeat	15,000	21,913	24,288
Total Sector	**15,000**	**45,765**	**24,511**

1. The wages and salaries cost per employee reflects the employment cost to the employer, not the average wages and salaries received by the employee.
2. The minimum and maximum values refer to the lower and upper limits of the range in values for 80 per cent of the businesses (i.e. the 10 per cent lowest and 10 per cent highest values are excluded).
3. This is the average value for all businesses in each subsector.

- Between 2017 and 2018, the average direct full-time employee equivalent cost in the food and drinks processing sector increased by 1.3 per cent from £24,201 to £24,511.

- In 2017, the fish subsector had the lowest average level of wages and direct salaries per direct employee in 2017 with a value of £18,624.

- The highest average level of wages and salaries per direct employee in 2017 was in the drinks subsector with a value of £39,744.

Table 15b Subsectors with high, medium and low average wages and salaries cost per FTE direct employee

High (>£27,000)	Medium (£21,000 to £27,000)	Low (<£21,000)
Animal By-Products	Bakeries	Fish
Drinks	Beef and Sheepmeat	Pigmeat
Milk and Milk Products	Fruit and Vegetables	Eggs
	Poultrymeat	

Table 16a Net profit as a percentage of sales, by subsector, 2017

	Net Profit (percentage of sales)		
	Minimum[1]	Maximum[1]	Average[2]
Animal By-Products	6	16	10.8
Bakeries	1	11	4.9
Beef and Sheepmeat	0	7	2.1
Drinks	1	10	5.8
Eggs	2	13	8.3
Fish	0	12	4.1
Fruit and Vegetables	0	9	5.4
Milk and Milk Products	0	14	3.2
Pigmeat	2	7	5.9
Poultrymeat	3	5	6.6
Total Sector	**0**	**16**	**4.4**

1. The minimum and maximum values refer to the lower and upper limits of the range in values for 80 per cent of the businesses (i.e. the 10 per cent lowest and 10 per cent highest values are excluded).
2. This is the average value for all businesses in each subsector.

- In 2017, the average level of net profit as a proportion of sales in the food and drinks processing sector increased by 0.4 percentage points from 4.0 per cent in 2016 to 4.4 per cent in 2017.

- There was substantial variation in the profitability amongst businesses within each subsector.

- The highest average level of net profit as a proportion of sales in 2017 was recorded by the animal by-products subsector (10.8 per cent of sales).

- In 2017, the beef and sheepmeat subsector (2.1 per cent) recorded the lowest average level of net profit as a proportion of sales.

Table 16b Subsectors with high, medium and low average net profit as a percentage of sales

High (>8 per cent)	Medium (4 to 8 per cent)	Low (<4 per cent)
Animal By-Products	Bakeries	Beef and Sheepmeat
Eggs	Drinks	Milk and Milk Products
	Fish	
	Fruit and Vegetables	
	Pigmeat	
	Poultrymeat	

Table 17a Value added as a percentage of sales, by subsector, 2017

	Value added (percentage of sales)		
	Minimum[1]	Maximum[1]	Average[2]
Animal By-Products	21	45	20.5
Bakeries	24	56	33.8
Beef and Sheepmeat	9	32	13.1
Drinks	18	53	26.2
Eggs	10	27	16.4
Fish	8	28	19.3
Fruit and Vegetables	12	43	25.0
Milk and Milk Products	5	53	10.9
Pigmeat	9	34	17.1
Poultrymeat	17	31	28.4
Total Sector	**5**	**56**	**18.8**

1. The minimum and maximum values refer to the lower and upper limits of the range in values for 80 per cent of the businesses (i.e. the 10 per cent lowest and 10 per cent highest values are excluded).
2. This is the average value for all businesses in each subsector.

- Value added as a percentage of sales is considered to be one of the most important measures of performance because it provides an indication of the magnitude of value that is added to all the inputs which are used in the activity of processing before leaving the factory gate.

- Between 2016 and 2017, average value added as a percentage of sales decreased from 19.0 per cent to 18.8 per cent.

- Average value added as a percentage of sales decreased in seven out of the ten subsectors between 2016 and 2017. The largest decreases were in the fish subsector (-2.1 percentage points) and egg subsector (-0.9 percentage points). The largest increase was in the animal by-products subsector (+2.5 percentage points) and poultrymeat (+2.5 percentage points).

- In 2017, the highest average value added as a percentage of sales was in the bakeries (33.8 per cent of sales) subsector; the lowest was in the milk and milk products (10.9 per cent of sales) subsector.

- The range in average value added expressed as a percentage of sales recorded for the subsectors are partly explained by the presence of primary processing and further processing businesses within each subsector.

Table 17b Subsectors with high, medium and low average net profit as a percentage of sales

High (>25 per cent)	Medium (17 to 25 per cent)	Low (<17 per cent)
Bakeries	Animal By-Products	Beef and Sheepmeat
Drinks	Fish	Eggs
Fruit and Vegetables	Pigmeat	Milk and Milk Products
Poultrymeat		

Table 18a Wages and salaries as a percentage of sales, by subsector, 2017

	Wages (percentage of sales)		
	Minimum[1]	Maximum[1]	Average[2]
Animal By-Products	11	18	7.6
Bakeries	15	44	26.3
Beef and Sheepmeat	7	25	9.5
Drinks	10	34	13.2
Eggs	4	7	5.0
Fish	5	17	12.7
Fruit and Vegetables	7	29	16.1
Milk and Milk Products	3	34	6.0
Pigmeat	4	25	10.5
Poultrymeat	11	20	19.3
Total Sector	**3**	**44**	**12.0**

1. The minimum and maximum values refer to the lower and upper limits of the range in values for 80 per cent of the businesses (i.e. the 10 per cent lowest and 10 per cent highest values are excluded).
2. This is the average value for all businesses in each subsector.

- The wages and salaries bill is one of the main components of cost incurred by any business. The average wages bill represented 12.0 per cent of the total value of food and drinks processing sector sales in 2017; a decrease of 0.5 percentage points from 2016.

- In 2017, the range in values for average wages and salaries cost as a percentage of sales ranged from 5.0 per cent of sales in the eggs subsector to 26.3 per cent of sales in the bakeries subsector.

- There was an increase in the average wages and salaries cost as a percentage of sales between 2016 and 2017 in five subsectors.

- Within each subsector, the difference between the minimum and maximum proportion of sales represented by wages and salaries was quite large. Such differences have been recorded in previous years and reflect the wide range of types of processing activities undertaken and levels of mechanisation within subsectors.

Table 18b Subsectors with high, medium and low average net profit as a percentage of sales

High (>15 per cent)	**Medium (9 to 15 per cent)**	**Low (<9 per cent)**
Bakeries	Beef and Sheepmeat	Animal By-Products
Fruit and Vegetables	Drinks	Eggs
Poultrymeat	Fish	Milk and Milk Products
	Pigmeat	

ANNEX A

DEFINITIONS OF TERMS

Gross turnover	Sum of the annual turnovers of all the businesses in the subsector - also equal to the total annual sales of the businesses within the subsector
Value added	Calculated by deducting all of the ‘inputs’, which are the ‘outputs’ of other industries, from the gross turnover of the processing subsector. It is equal to the sum of the wages and salaries bill, depreciation, net profit and interest paid in the subsector
Agency employment	The supply of temporary additional workers to a company on a short term basis by an employment agency
Direct employees	Employees on the payroll of a company with a full contract of employment
Full-time employee	Someone employed for at least 30 hours per week
Part-time employee	Someone employed for less than 30 hours per week
Casual/seasonal employee	Someone not employed on a regular basis
Full-time employee equivalents	The part-time and casual employees converted to full-time equivalents, (by multiplying part-time employees by 0.5 and casual by 0.25), and added to the number of full-time employees
Gross profit	The difference between gross turnover and cost of sales
Wages and salaries	Total remuneration to directors and employees including National Insurance contributions, representing the employment cost to the employer, not the amount received by the employee
Depreciation	The depreciation charge made against all the tangible fixed assets in the business
Net profit	The profit generated after deduction of all costs and charges, including interest costs, but before deduction of tax
Total capital employed	The sum of the share capital, reserves and total borrowings for incorporated businesses and net worth plus total borrowings for partnerships and sole traders
Sales per employee	The gross turnover of the subsector divided by the total number of full-time employee equivalents in the subsector
Value added per employee	The total value added divided by the total number of full-time employee equivalents in the subsector
Total capital per employee	The total capital employed divided by the total number of full-time employee equivalents in the subsector
Average wage cost per employee	The wages and salaries bill divided by the total number of full-time employee equivalents in the subsector, reflecting the employment cost to the employer.
Gross profit as a percentage of sales	The gross profit divided by the gross turnover and expressed as a percentage
Net profit as a percentage of sales	Total net profit divided by the gross turnover and expressed as a percentage
Value added as a percentage of sales	Total value added divided by the gross turnover and expressed as a percentage
Wages and salaries as a percentage of sales	Wages and salaries bill divided by the gross turnover and expressed as a percentage.
Interest costs as a percentage of sales	Total interest paid by businesses divided by the gross turnover and expressed as a percentage.
Sales per £1,000 wages	Sales divided by the wages and salaries bill and multiplied by 1,000.
Value added per £1,000 wages	Value added divided by the wages and salaries bill and multiplied by 1,000.
Interest costs as a percentage of gross profit	Total interest paid by businesses divided by the total gross profit and expressed as a percentage.
Interest costs as a percentage of net profit	Total interest paid by businesses divided by the total net profit and expressed as a percentage.
Rate of return on capital employed	Net profit plus interest paid divided by the total capital employed and expressed as a percentage.

ANNEX B

DEFINITIONS OF SUBSECTORS

Animal By-Products	Businesses which process red offals and fats which enter the human food chain. It excludes pet food, rendering, and hide and skin processing businesses.
Bakeries	Flour milling and bread and pastry manufacturers. Home bakeries, which sell their products through their own retail outlets, are excluded.
Beef and Sheepmeat	All the businesses involved in the slaughtering of cattle and sheep and the processing of beef and sheepmeat.
Drinks	Both alcoholic and non-alcoholic drinks manufacturing businesses. The main products are bottled water, soft drinks, beers and whiskey.
Eggs	Businesses involved in the grading and packing of eggs and the preparation of egg components for bakeries and catering businesses.
Fish	Businesses which process and package freshwater and sea fish species. Activities range from filleting to preparing cooked products.
Fruit and Vegetables	A wide range of businesses from those principally involved in the grading and packing of fruit and vegetables to those which manufacture products such as potato crisps. Wholesale fruit and vegetable businesses are excluded.
Milk and Milk Products	Businesses which pasteurise milk and those which manufacture milk products such as butter, cheese, ice-cream and yoghurt. Data does not include milk roundsmen activities.
Pigmeat	all businesses involved in the slaughter and processing of pigs. Products include bacon, pork, hams and sausages.
Poultrymeat	All slaughtering and processing of table poultry such as chickens, ducks and turkeys. Products range from whole birds to highly developed ready meals based on chicken.

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