NISRA
Northern Ireland Statistics and Research Agency

OFFICIAL STATISTICS
Accredited

# Statistical Review of Northern Ireland Agriculture
*2023*

***Sustainability** at the heart of a living, working, active landscape valued by everyone.*

Department of
Agriculture, Environment and Rural Affairs
www.daera-ni.gov.uk

An Roinn
Talmhaíochta, Comhshaoil agus Gnóthaí Tuaithe

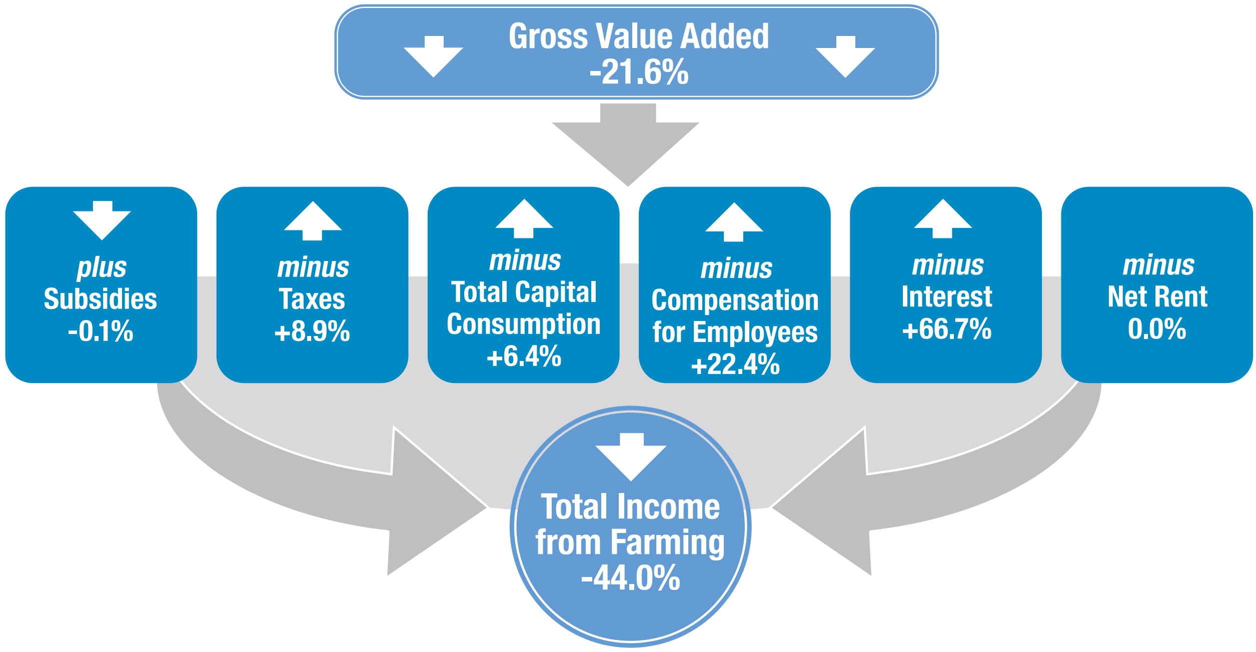
Depairtment o'
Fairmin, Environment an' Kintra Matthers

**An accredited Official Statistics Publication**

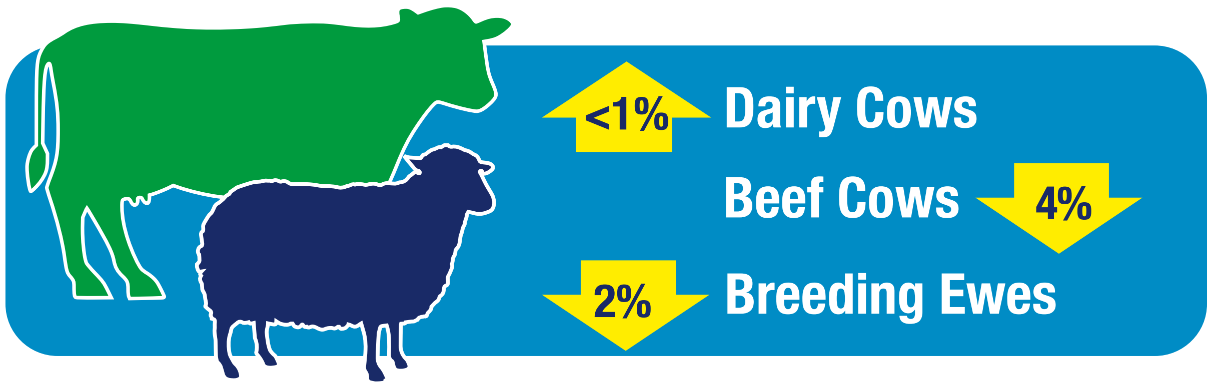
# Statistical Review of Northern Ireland Agriculture 2023

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

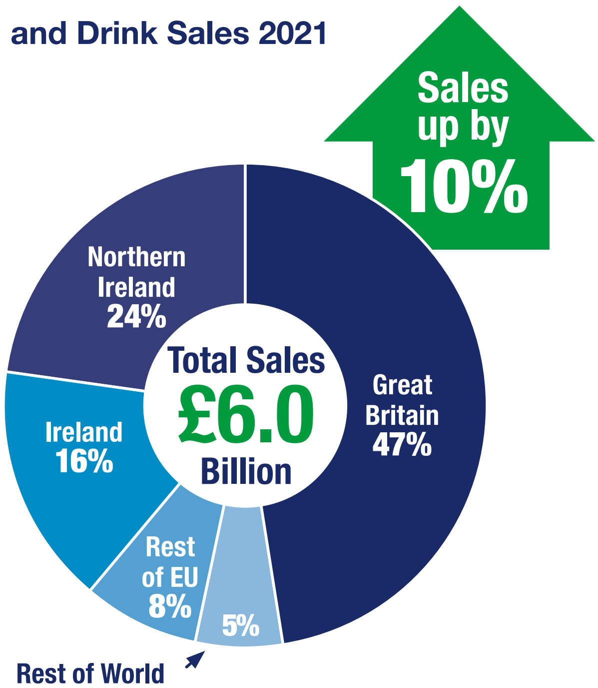
## Agricultural Income changes 2022 & 2023



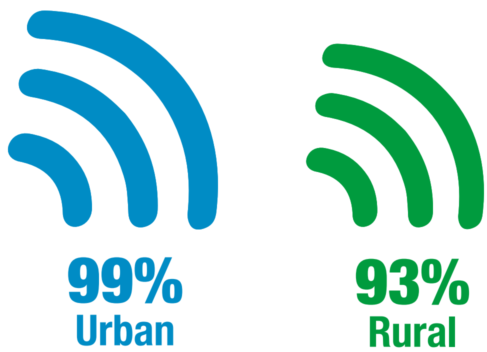

## Cattle and Sheep Changes 2023




## Northern Ireland Food and Drink Sales 2021




## Coverage of Superfast Broadband 2023




## Greenhouse Gas Emissions 2022

# Key Facts 2023

*Note: comparisons are with 2022 unless otherwise stated.*

**Aggregate income (Tables 2.1 - 2.3)**

- The agricultural income of Northern Ireland farms decreased in 2023.
- **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 - decreased by 44.0 per cent (47.8 per cent in real terms) to £341 million, from £609 million in 2022.
- Following the decrease in 2023, TIFF is now 14.0 per cent below the average of the last twenty years after accounting for inflation.
- The main factor behind the decrease of TIFF in 2023 was reduced milk prices which were 21.3% down from their record high levels of the previous year.
- Input costs also remained elevated when compared to historic levels with gross input costs for the farm sector being 40% higher in 2023 than 2020 levels. This was driven by marked increases in the prices for feed, fertiliser, electricity and fuels during this time. Unit prices for these inputs have reduced to some extent during 2023 compared to 2022 but remained elevated when compared to historic levels.

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

- **Gross output** of Northern Ireland agriculture is estimated at £2.87 billion for 2023, a 6.6 per cent decrease from 2022. There were also decreases in the output for almost all sub-sectors. In particular milk output was down by £244 million to £892.4 million due to a 21.3% decrease in milk prices.
- **Gross input** (or 'intermediate consumption') decreased by 0.4 per cent, to £2.17 billion. Feedstuff costs, which accounted for 57.0 per cent of the gross input figure, increased by 4.9 per cent in 2023 to £1.24 billion. There was a 3.3 per cent increase in the volume of feedstuffs purchased and a 1.6 per cent increase in the average price paid per tonne. Total machinery expenses decreased by 2.5 per cent to £199 million in 2023. This decrease was mainly due to a 9.7 per cent decrease in the cost of fuel & oils. Agricultural contracting costs also increased by 2.6 per cent to £122 million in 2023 whereas, total fertiliser and lime costs decreased by 42.4% to £112 million in 2023.
- **Gross value added** decreased in 2023 to £699 million; a decrease of 21.6 per cent, while **net value added** - gross value added less consumption of fixed capital (or 'depreciation') plus direct CAP subsidies decreased by 27.3 per cent, to £580 million.

| | |
|---|---|
| **Productivity (Table 2.3)** | • Changes in the volumes of outputs and inputs combined to produce a 4.6 per cent decline 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, decreased by 8.0 per cent. |
| **Cash flow (Table 2.4)** | • **Cash available to farm families from farming activity** was estimated to have decreased by 32.3 per cent, to £350 million. In this estimate, 'non-cash' 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. |
| **Farm level incomes (Tables 5.3 -5.4)** | • **Farm Business Income (FBI)** is the headline measure of farm-level income used throughout the UK. Measured across all farm types, average Farm Business Income increased from £43,252 in 2021/22 to £51,043 in 2022/23, an increase of £7,792 per farm. It is expected to decrease from £51,043 in 2022/23 to £27,345 in 2023/24, i.e. a decrease of £23,699 or 46% per farm. |
| **Subsidies (Table 2.10)** | • The value of all **direct payments** to farmers decreased by 0.1 per cent or £0.4 million, to £304.1 million in 2023.<br><br>The total value of the Basic and Young Farmer payments estimated to have accrued in 2023 was £298 million, an increase of 0.4 per cent or £1.1 million compared with the equivalent payments in 2022. The Basic, and Young Farmer payments account for approximately 98 per cent of all direct payments. |
| **Labour (Table 4.12)** | • The **total agricultural labour force** in 2023 was 52,676 persons, a 1.8 per cent increase from 2022. |
| **Livestock numbers (Table 3.3)** | • The number of **cattle** recorded in the June 2023 census was 1.67 million head, a 0.8 per cent decrease from the previous year. At June 2023, there were 319,346 dairy cows an increase of 0.8 per cent from 2022 and 236,082 beef cows a decrease of 4.1 per cent compared to 2022. In June 2023, the **sheep** breeding flock was 2.4 per cent smaller than in 2023 at 973,718 ewes. Including lambs and other sheep the entire flock totalled 2 million in 2023.<br>• At June 2023, the total number of **pigs** was 682,339, a decrease of 7.6 per cent compared to 2022. There was a 2.4 per cent increase to 47,843 in sow numbers and an 8.3 per cent decrease to 634,496 in the number of other pigs. **Broiler** numbers increased by 31.2 per cent to 15.6 million birds, while the size of the **commercial laying flock** increased by 9.5 per cent to 5.8 million birds. |

**Crops and grass areas (Table 3.2)**

- There was a 0.6 per cent decrease, to 47,777 hectares, in the total **agricultural cropped area** between June 2022 and 2023. The total area of **cereals** was 31,803 hectares in June 2023, which was a decrease of 2.7 per cent compared to 2022. In 2023, the total area of potatoes grown decreased to 3,258 hectares compared to 3,486 in 2022.

**Farm Numbers (Table 4.2)**

- There were 26,131 active **farm businesses** in Northern Ireland at June 2023, a 0.2 per cent increase from 2022.

**Food and Drinks Sector**

- The performance indicators for the **food and drinks processing sector** indicate an increase in gross turnover between 2016 and 2021. Employment has also grown over the period. Exports account for 29 per cent of sales by the food and drinks processing sector.

**Rural Population**

- In 2021, 61 per cent of people lived in an urban area, with approximately 39 per cent living in a non-urban area (i.e. ‘rural’ or ‘mixed’). Households in more remote rural areas continue to have lower average incomes than those closer to Belfast.

**Animal Health & Welfare**

- There have been no cases of BSE since 2012. During 2023 2,199 new herds in Northern Ireland were affected by bovine tuberculosis compared with 2,253 in 2022. The last confirmed brucellosis breakdown occurred in February 2012 and Northern Ireland achieved Official Brucellosis Freedom on 6 October 2015. Bovine viral diarrhoea (BVD) is a highly contagious viral disease of cattle and in March 2016 compulsory testing was introduced. In 2023, the animal incidence rate for BVD remains at less than 1%.
- The Veterinary Service (DAERA) carried out 636 on-farm welfare inspections in 2023. Of the inspections carried out 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 100 per cent were fully compliant with legislation. In 2023, two farm animal keepers were disqualified by the courts as a result of serious welfare breaches.

**Environment**

- In 2023, some 62,000 hectares of farmland were managed under the Environmental Farming Scheme in Northern Ireland.
- In 2022, agriculture was estimated to contribute 29 per cent of all greenhouse gas emissions in Northern Ireland. Total emissions from agriculture increased by 14.9 per cent between 1990 and 2022.
- In 2021, approximately 31 per cent of river water bodies were classified as ‘high’ or ‘good’ ecological status.
- 433 hectares of new woodland was planted in Northern Ireland in 2023/24, compared to 451 hectares in 2022/23.

# Key Facts Comparisons 2023

| | NI | UK | ROI | EU27 |
|---|---|---|---|---|
| **GROSS VALUE ADDED (GVA)** | | | | |
| Agriculture as % of total GVA | 1.4[P] | 0.6 | 0.7 | 1.5 |
| Food and drink processing as % of total GVA | 2.4[2] | 1.6[5] | - | - |
| **EMPLOYMENT** | | | | |
| Agricultural employment ('000) | 26 | 316 | 101 | 7,417[1] |
| As % of total civil employment | 2.9 | 1.0 | 3.8 | 3.7[1] |
| Food and drink processing employment ('000) | 16 | 309 | 58[1] | 4,588[1] |
| As % of total civil employment | 1.8 | 0.9 | 2.2[1] | 2.3[1] |
| **LAND USE** | | | | |
| Agricultural area ('000 ha) | 1,042 | 17,022 | 4,189 | 161,495[5] |
| As % of total area | 77 | 70 | 60 | 39[5] |
| **LESS FAVOURED AREAS (LFA)** | | | | |
| LFA as % of agricultural area | 69.6 | 50.4[4] | 75.0[6] | 50.7[6] |
| **FARMS** | | | | |
| Number ('000) | 26 | 209 | 135[3] | 9,067[3] |
| Average agricultural area (ha) | 39.9 | 81.9 | 33.4[3] | 17.1[3] |
| **ENTERPRISES**<br>Average enterprise size: | | | | |
| Dairy cows | 101 | 105[2] | 90[3] | - |
| Beef cows | 17 | 28[2] | 15[3] | - |
| Sheep | 206 | - | 156[3] | - |
| Pigs | 1,849 | 519[2] | 1,106[3] | - |
| Laying hens | 10,610 | - | 558[3] | - |
| Broilers | 57,214 | - | 27,383[3] | - |
| Cereals (ha) | 15.1 | 70.5[2] | 28.3[3] | - |
| Potatoes (ha) | 9.2 | 16.7[2] | 8.2[3] | - |

*1. 2022, 2. 2021, 3. 2020, 4. 2019, 5. 2018, 6. 2007, P = Provisional*

*Note 1.* *NI = Northern Ireland; UK = United Kingdom; ROI = Republic of Ireland; EU27 = Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Republic of Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, The Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain and Sweden.*

*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.*

*Note 4.* *The value given for LFA in the EU27 grouping excludes Croatia as it was not a member state in 2007.*

# Key Facts Comparisons 2023 (Continued)

### Total Income from Farming, 2023

| | NI | UK |
|---|---|---|
| Total income from farming | £341m | £7,232m |
| **% change on previous year** | | |
| Current prices | -44.0 | -9.8 |
| Real terms | -47.8 | -15.8 |

### Gross Output from Farming, 2023

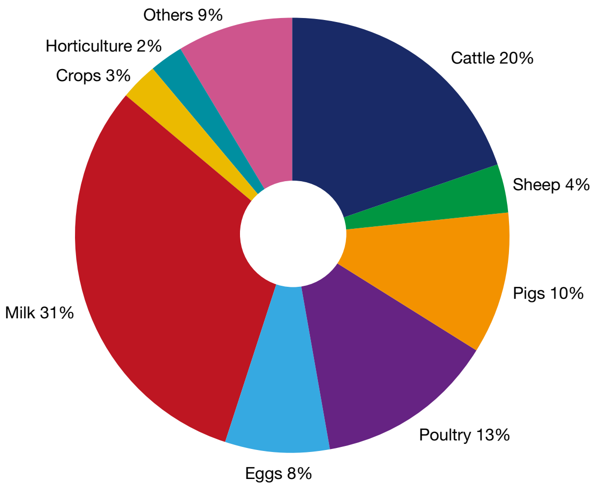
| Enterprise | NI | | UK | | NI as % of UK |
|---|---|---|---|---|---|
| | £m | % | £m | % | % |
| Dairy | 892 | 31.1 | 5,983 | 17.2 | 14.9 |
| Cattle | 568 | 19.8 | 3,908 | 11.3 | 14.5 |
| Sheep & wool | 109 | 3.8 | 1,582 | 4.6 | 6.9 |
| Pigs | 297 | 10.4 | 1,838 | 5.3 | 16.2 |
| Poultry & eggs | 603 | 21.0 | 4,545 | 13.1 | 13.3 |
| Cereals & other crops | 55 | 1.9 | 6,399 | 18.4 | 0.9 |
| Potatoes | 31 | 1.1 | 1,005 | 2.9 | 3.0 |
| Horticulture | 70 | 2.4 | 4,586 | 13.2 | 1.5 |
| Others | 243 | 8.5 | 4,873 | 14.0 | 5.0 |
| **Total** | **2,870** | **100** | **34,720** | **100** | **8.3** |

### Total Expenditure of Farming, 2023

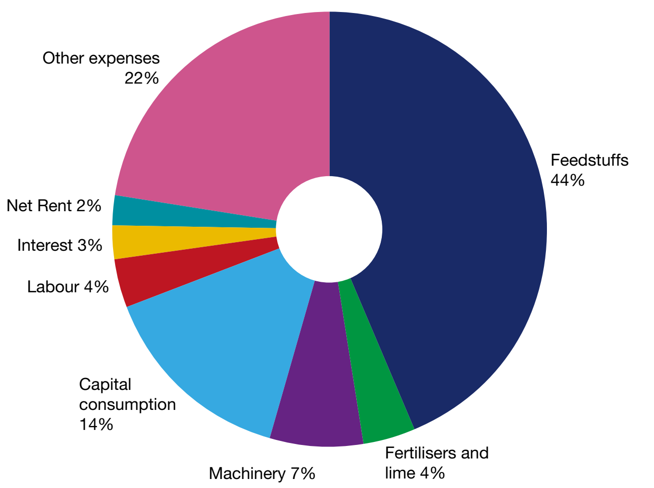
| Expense | NI | | UK | | NI as % of UK |
|---|---|---|---|---|---|
| | £m | % | £m | % | % |
| Feedstuffs | 1,238 | 43.7 | 7,820 | 25.7 | 15.8 |
| Fertilisers and lime | 112 | 3.9 | 1,362 | 4.5 | 8.2 |
| Machinery | 199 | 7.0 | 2,353 | 7.7 | 8.5 |
| Capital consumption | 412 | 14.5 | 5,140 | 16.9 | 8.0 |
| Labour | 103 | 3.6 | 3,020 | 9.9 | 3.4 |
| Interest | 77 | 2.7 | 510 | 1.7 | 15.1 |
| Net rent | 59 | 2.1 | 587 | 1.9 | 10.1 |
| Other expenses | 633 | 22.3 | 9,647 | 31.7 | 6.6 |
| **Total** | **2,833** | **100** | **30,441** | **100** | **9.3** |

# Comparisons of NI and UK Agriculture

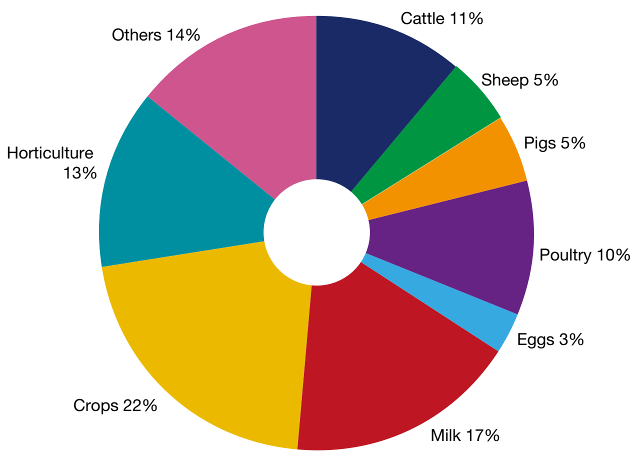
**Gross output of NI agriculture, 2023**



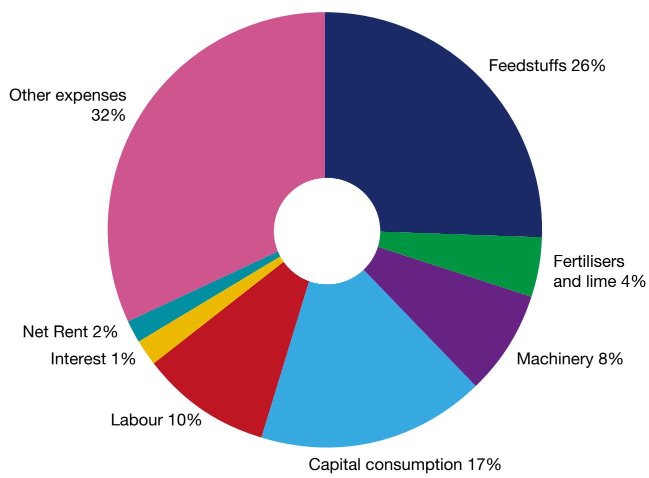

**Total expenses of NI agriculture, 2023**



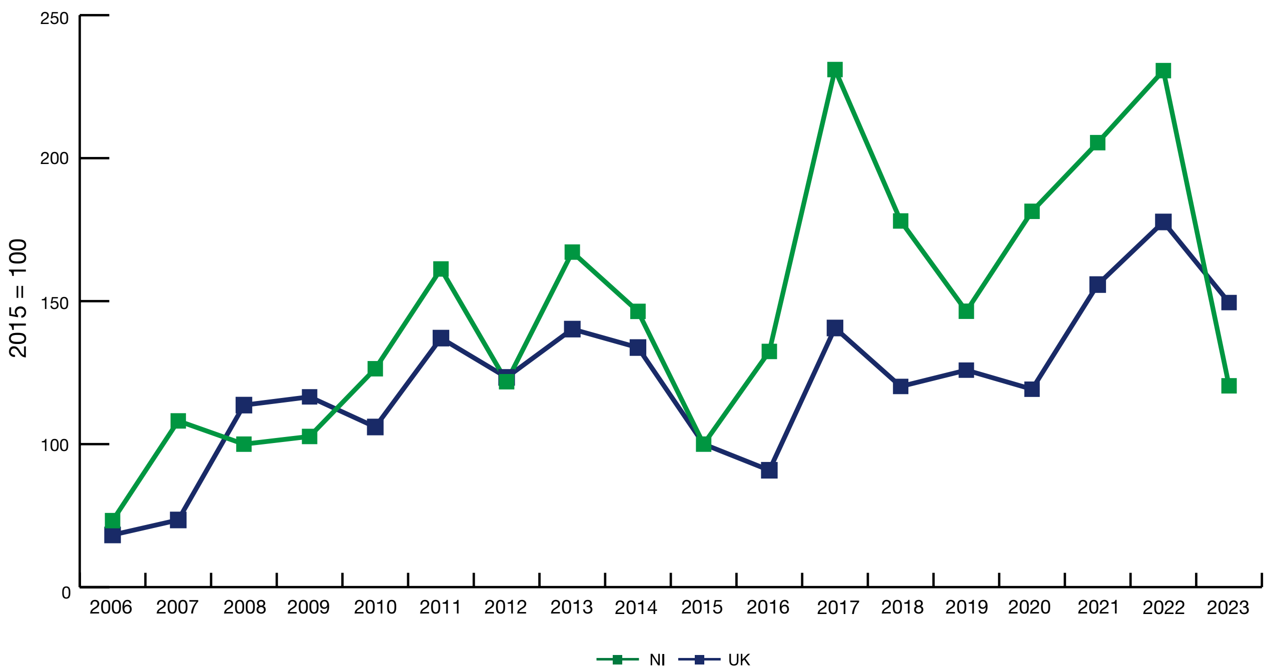

**Gross ouput of UK agriculture, 2023**




**Total expenses of UK agriculture, 2023**

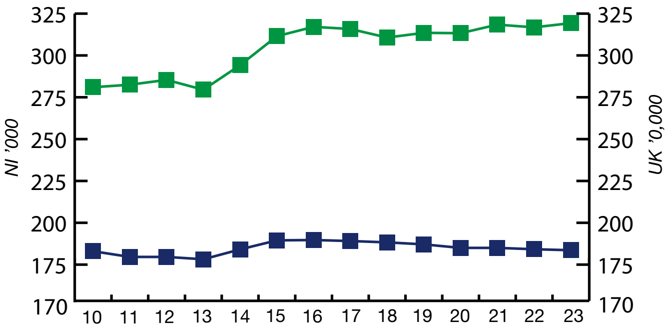



**NI and UK Total Income from Farming Indices in real terms (2015 = 100)**

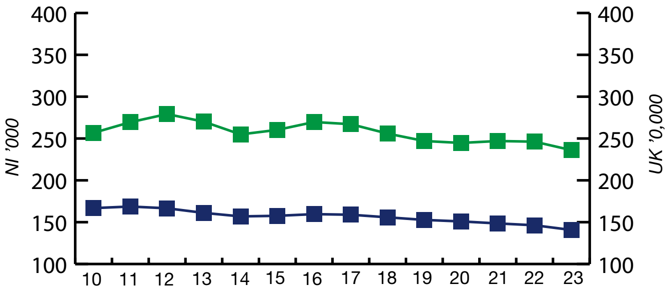


# Trends in NI and UK Livestock Numbers and Crop Areas

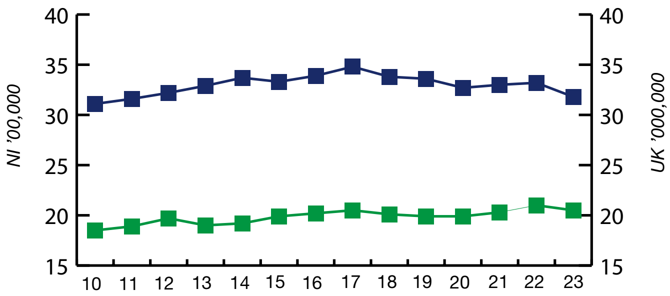
**Dairy cows**



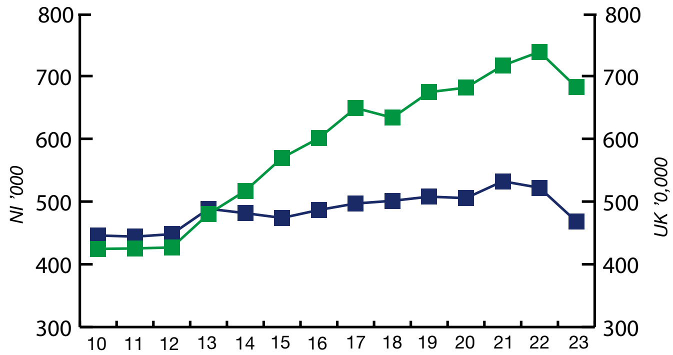

**Beef cows**




**Sheep**




**Pigs**




**Breeding and laying birds**

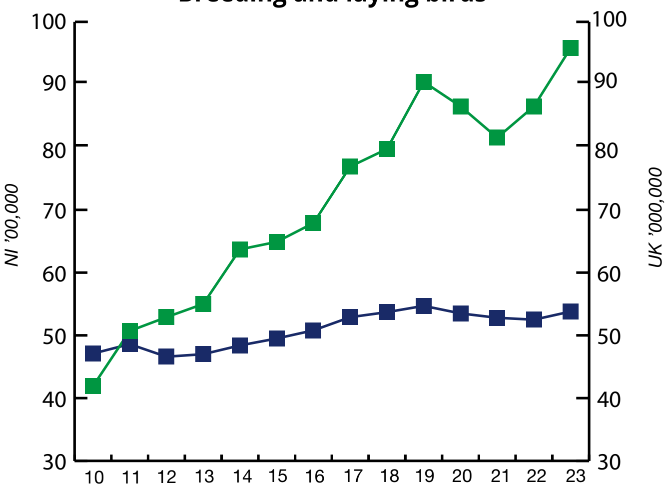
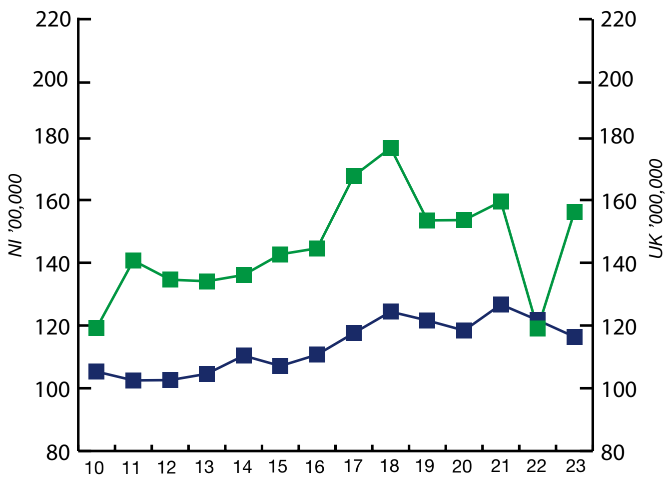
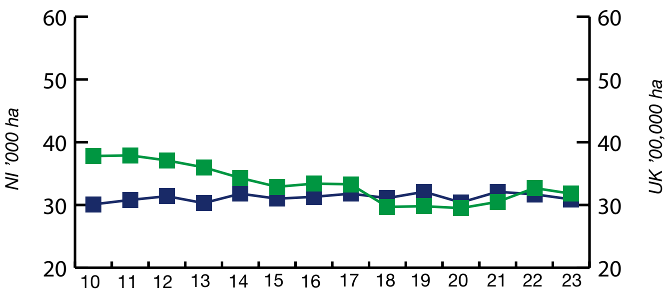


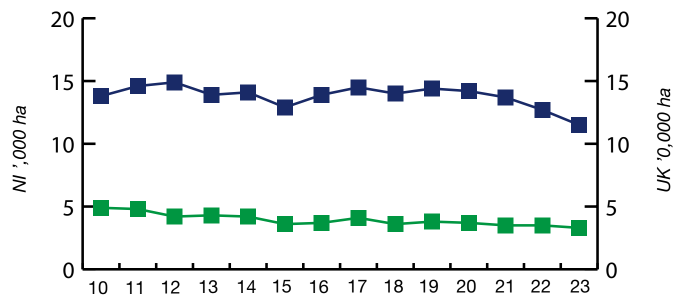

**Table chickens**




**Cereals**




**Potatoes**




NI UK

# Contents

# 1. Introduction

The *Statistical Review of Northern Ireland Agriculture* is a compendium of agri-food, environment and rural statistics that is published annually. It is an important reference document for both DAERA stakeholders and policy makers. The data contained in the *Statistical Review* are derived from farm surveys, as well as surveys of food processors and agricultural input supply firms, administrative data sources, and other environmental and rural data sources.

This is the 60th edition of the publication which is produced by Policy, Economics & Statistics Division, DAERA. Any queries or comments on its contents can be made to the Editor, Paul Keatley, whose contact details are given below.

Department of Agriculture, Environment and Rural Affairs
Policy, Economics and Statistics Division
Clare House
303 Airport Road West
Sydenham Intake
Belfast
BT3 9ED

Tel: 028 9052 4063
E-mail: Paul.Keatley@daera-ni.gov.uk
X (Twitter): @DAERAstats

# 2. The Agricultural Economy

## A. Aggregate Output, Input and Income

### Summary

Key findings for 2023 compared to 2022 are as follows:

- **Northern Ireland Total income from farming (TIFF)** decreased by 44.0 per cent (47.8 per cent in real terms) from £609 million in 2022 to £341 million in 2023.
- **Gross output** in 2023 was estimated at £2.87 billion which is 6.6 per cent lower than the 2022 value.
- **Gross input** (or 'intermediate consumption) decreased during 2023 to £2.17 billion; 0.4 per cent lower. This decrease can mainly be attributed to a 42.4 per cent reduction in fertilisers (including lime) costs and a 9.7 per cent reduction in machinery fuel (including oils) costs.
- **Total factor productivity** decreased by 4.6 per cent between 2022 and 2023. This was driven by a decrease in the volume of outputs and a slight increase in the volume of inputs.
- **Total direct payments** to farmers decreased by 0.1 per cent or £0.4 million, to £304.1 million in 2023.

Contact: Paul Keatley, Tel. 028 9052 4063, E-mail: Paul.Keatley@daera-ni.gov.uk

### Introduction

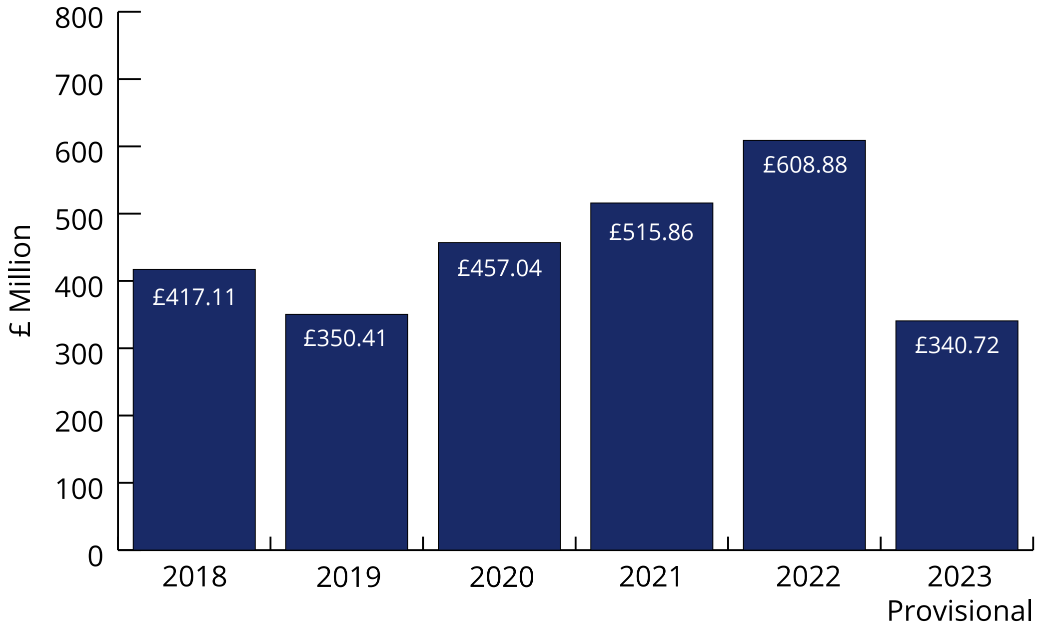
This sub-chapter presents the aggregate account for Northern Ireland agriculture and associated statistics including incomes, prices, productivity, subsidies, and labour. The headline measure of Total income from farming (TIFF) represents the return on own labour, management input and own capital invested for all those with an entrepreneurial involvement in farming (including all members of the family working on farm).

### Total income from farming (TIFF) in recent years

Figure 2.1 shows the value of TIFF from 2018 to 2023. Since 2018, the average value of TIFF has been £448 million per year, with the lowest value of £341 million occurring in 2023, and the highest value of £609 million occurring in 2022.

TIFF decreased in 2023, by 44.0 per cent to £341 million, a decrease of 47.8 per cent after allowing for inflation. Following this decrease in 2023, TIFF was 14.0 per cent below 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. From 2004 to 2023, the number of units of entrepreneurial labour decreased by 0.2 per cent with the result that, in real terms, **TIFF per unit of entrepreneurial labour** in 2023 was 18.1 per cent below the 20-year average.

**Figure 2.1: Total Income from Farming for Northern Ireland at current prices, 2018 - 2023**

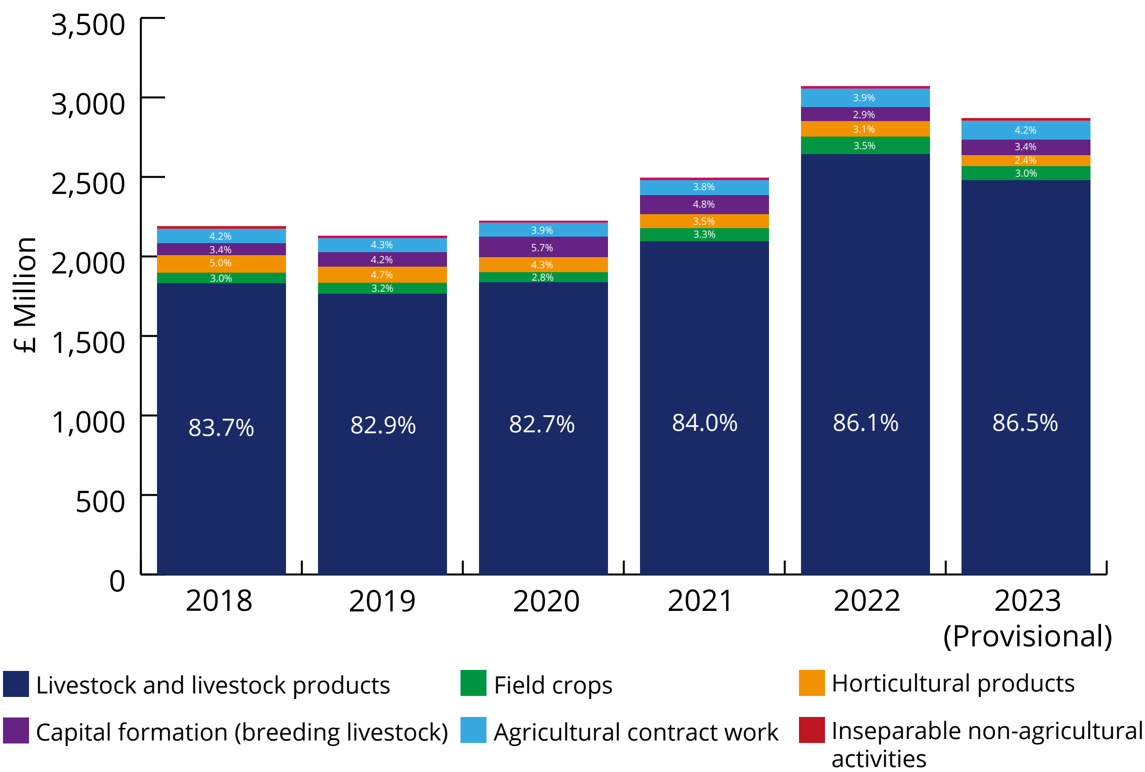



See Table 2.1 for the full Aggregate Agricultural Account dataset.

## Output

The value of gross output in 2023, estimated at £2.87 billion, was 6.6 per cent lower compared with 2022. However, this masks some significant variations across the different commodities. Full details of commodity trends in all the individual outputs are given in Section 2B.

**Figure 2.2: Breakdown of agricultural gross output for Northern Ireland, 2018-2023**

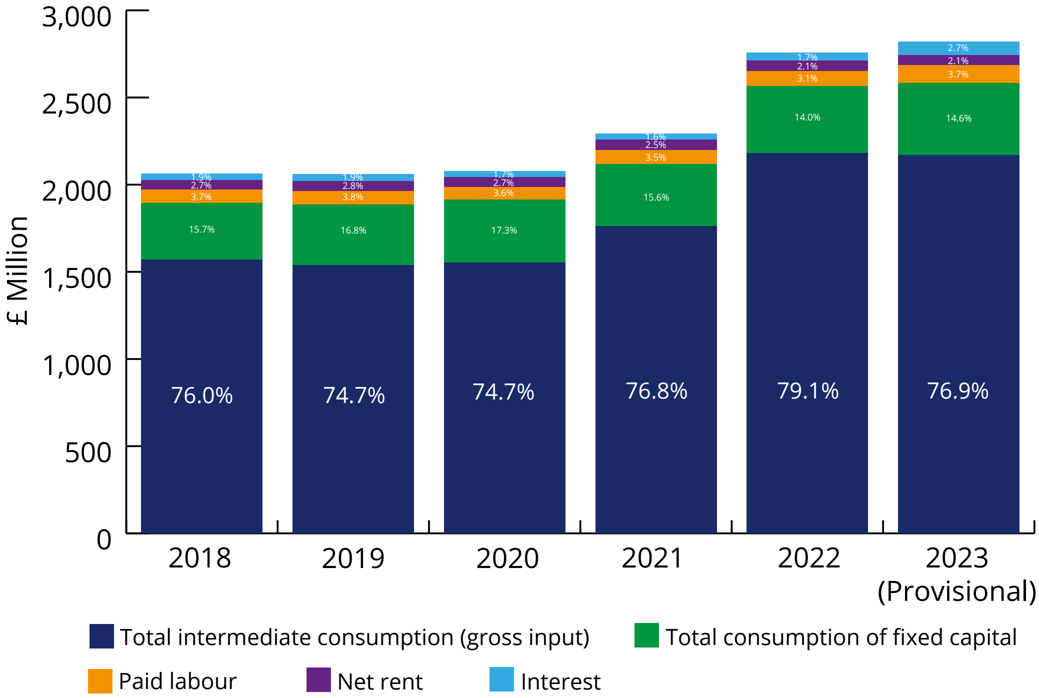



See Table 2.1 for the full Aggregate Agricultural Account dataset.

## **Inputs** (or 'intermediate consumption) and other costs

The value of **gross input** also decreased during 2023, to £2.17 billion; 0.4 per cent lower. This decrease can mainly be attributed to a 42.4 per cent reduction in fertilisers (including lime) costs and a 9.7 per cent reduction in machinery fuel (including oils) costs. Full details of trends in individual inputs are also given in Section 2B.

### Figure 2.3: Agricultural gross input and other costs in Northern Ireland, 2018 - 2023



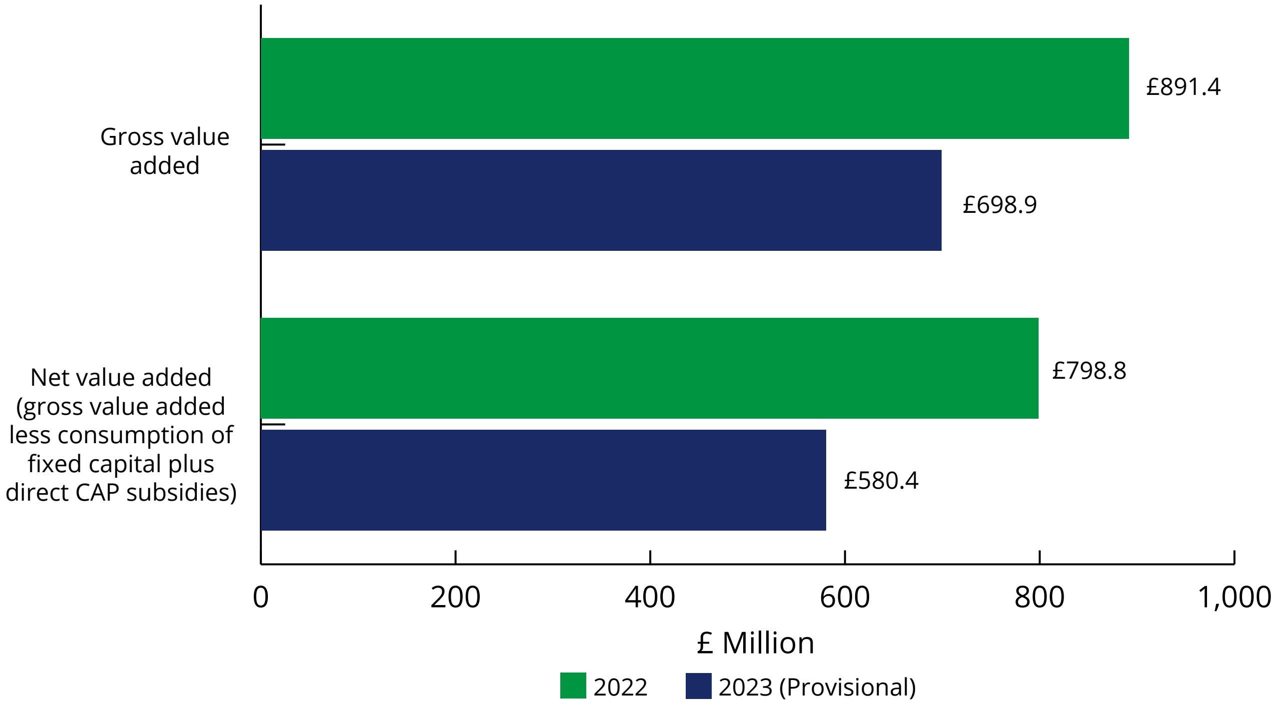

See Table 2.1 for the full Aggregate Agricultural Account dataset.

## Gross and net value added

**Gross value added** - gross output less gross input - decreased by 21.6 per cent to £699 million in 2023 as a result of the decrease in gross output and the decrease in gross input. **Net value added** (at factor cost), i.e. gross value added less consumption of fixed capital (or 'depreciation') plus direct CAP subsidies - decreased by 27.3 per cent, to £580 million.

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') increased by 22.4 per cent to £103 million in 2023 from £84 million in 2022. The total cost of borrowings in agriculture (interest payments plus financial intermediation services indirectly measured (FISIM), see Table 2.26) increased by 47.7 per cent to £90.3 million, whereas conacre rent paid to non-farmers in 2023 remained relatively unchanged at £59 million.

### Figure 2.4: Gross and net value added from farming in Northern Ireland, 2022 - 2023




See Table 2.1 for the full Aggregate Agricultural Account dataset.

## Income Indicators at current prices and real terms, 2018 - 2023

In 2023, total income from farming (TIFF) was 53.9 per cent higher and Net Value Added (NVA) was 54.5 per cent higher than their respective 2015 levels. After allowing for inflation, the increases in 2023 were 20.4 per cent for TIFF and 20.8 per cent for NVA when compared to 2015 levels.

### Northern Ireland Agricultural income indicators at current prices and in real terms, 2018 - 2023

*Indices: 2015 = 100*

| | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 (Provisional) |
|---|---|---|---|---|---|---|
| **Index at current prices** | | | | | | |
| Net value added | 156.3 | 140.0 | 165.9 | 183.7 | 212.6 | 154.5 |
| Total income from farming[1] | 188.5 | 158.3 | 206.5 | 233.1 | 275.1 | 153.9 |
| **Index in real terms[1]** | | | | | | |
| Net value added | 147.7 | 129.5 | 145.7 | 161.9 | 178.2 | 120.8 |
| Total income from farming | 178.0 | 146.5 | 181.4 | 205.4 | 230.6 | 120.4 |

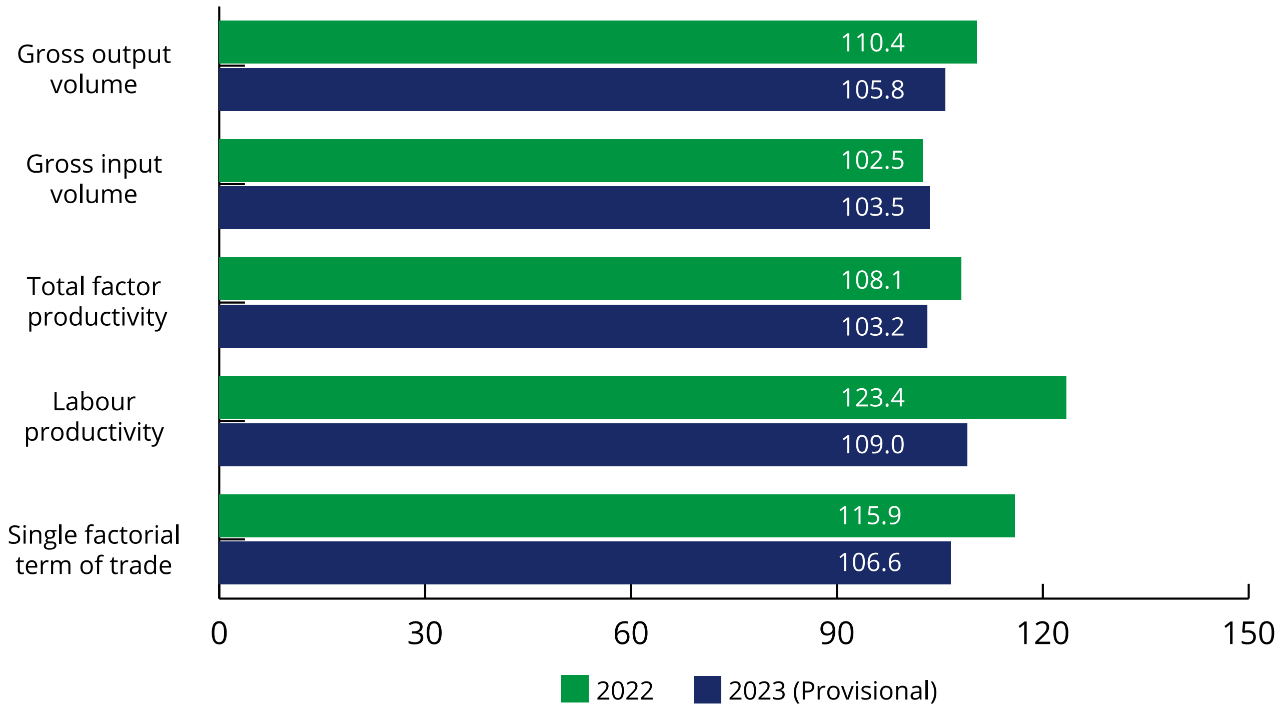
1. Deflated by GDP deflator to account for inflation.

See Table 2.2 for the summary income indicators dataset.

## Productivity

Changes in the volumes of outputs and inputs combines to produce a 4.6 per cent decline in **total factor productivity (TFP)** - the productivity of all the resources in the industry. This was driven by a decrease in the volume of outputs and a slight increase in the volume of inputs. Labour productivity (Gross output per labour unit) decreased by 11.7 per cent. **Single factorial terms of trade**, which is a measure of economic welfare that takes account of changes in both total factor productivity and prices, decreased by 8.0 per cent.

**Figure 2.5: Agricultural output, input and productivity indices in Northern Ireland, 2022-2023 (2015 = 100)**




See Table 2.3 for the full productivity indices dataset.

## Cash flow

Total income from farming (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 (depreciation). TIFF may not, therefore, realistically portray the cash available from farming. In the estimates shown in the table below, TIFF is adjusted to remove these non-cash 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** was estimated to have decreased by 32.3 per cent, to £349.9 million in 2023.

### Headline figures on estimated cash flow for Northern Ireland agriculture 2022-2023

*£ million*

| | 2022 | 2023 (Provisional) |
|---|---|---|
| **Total income from farming** | 608.9 | 340.7 |
| Less: | | |
| output stock change | +2.8 | -54.7 |
| gross fixed capital formation (breeding livestock) | 89.1 | 96.7 |
| capital investment | 323.1 | 316.5 |
| | | |
| Plus: | | |
| input stock change | -0.5 | -2.6 |
| capital consumption | 387.0 | 411.6 |
| capital grants paid in year | 11.9 | 13.2 |
| change in borrowings | -75.7 | -54.6 |
| | | |
| **Cash available to farm families from farming** | **516.8** | **349.9** |

See Table 2.4 for the full cash flow for agriculture dataset.

## Aggregate gross margins estimates

The aggregate gross margin for the main agricultural sectors decreased in 2023, by 14.0 per cent to £1,217 million. This was mainly driven by a gross margin fall of £248 million in the grazing livestock sector between 2022 and 2023.

## Headline figures on aggregate gross margin estimates for the main agricultural sectors 2022-2023

| 2022 | | | | | | | |
|---|---|---|---|---|---|---|---|
| | Adjusted ouputs | Estimated specific costs | | | | Sector gross margins | |
| Sector | | Feedstuffs | Fertilisers, seeds & sprays | Others | Total | | |
| | £m | £m | £m | £m | £m | £m | % |
| Total grazing livestock | 1,894.5 | 569.5 | 184.1 | 44.8 | 798.5 | 1,096.0 | 77.4% |
| Total intensive livestock | 783.3 | 616.2 | - | 18.7 | 635.0 | 148.3 | 10.5% |
| Total field crops | 205.2 | - | 32.2 | 10.2 | 42.4 | 162.8 | 11.5% |
| Other items | 15.5 | 4.6 | 2.6 | 0.1 | 7.4 | 8.1 | 0.6% |
| **Total** | **2,898.4** | **1,190.3** | **219.0** | **73.9** | **1,483.2** | **1,415.2** | **100.0%** |

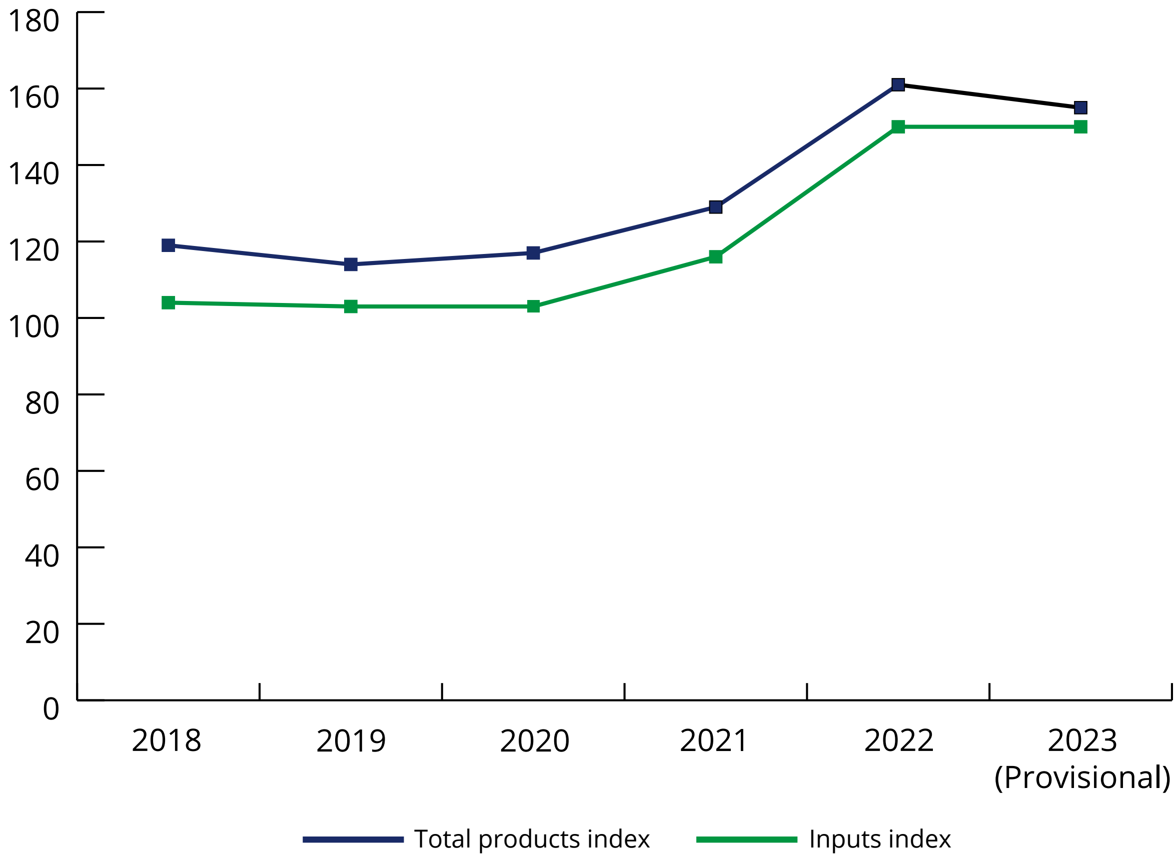
| 2023 (Provisional) | | | | | | | |
|---|---|---|---|---|---|---|---|
| | Adjusted ouputs | Estimated specific costs | | | | Sector gross margins | |
| Sector | | Feedstuffs | Fertilisers, seeds & sprays | Others | Total | | |
| | £m | £m | £m | £m | £m | £m | % |
| Total grazing livestock | 1,603.5 | 610.5 | 103.2 | 41.8 | 755.5 | 848.0 | 69.7% |
| Total intensive livestock | 900.5 | 627.9 | - | 20.2 | 648.1 | 252.4 | 20.7% |
| Total field crops | 155.7 | - | 35.9 | 8.0 | 44.0 | 111.8 | 9.2% |
| Other items | 14.4 | 7.8 | 1.5 | 0.1 | 9.4 | 5.1 | 0.4% |
| **Total** | **2,674.2** | **1,246.3** | **140.6** | **70.1** | **1,457.0** | **1,217.2** | **100.0%** |

See Table 2.5 for the full dataset on aggregate gross margins estimates.

## Producer prices

Compared with 2022, the annual average price indexes for 2023 were 4.1 per cent lower for agricultural outputs (total products index) and 0.5 per cent lower for agricultural inputs (inputs index). Whereas, when compared with 2015, the price indexes for outputs and inputs in 2023 were 55 per cent and 50 per cent above their respective 2015 levels.

**Figure 2.6: Total products and inputs indices, Northern Ireland, 2018-2023 (2015 = 100)**




See Table 2.6 for the dataset on quantities of the main products in output.

See Table 2.7 for the dataset on average producer prices of agricultural products.

See Table 2.8 for the full dataset on indices of producers prices of agricultural output.

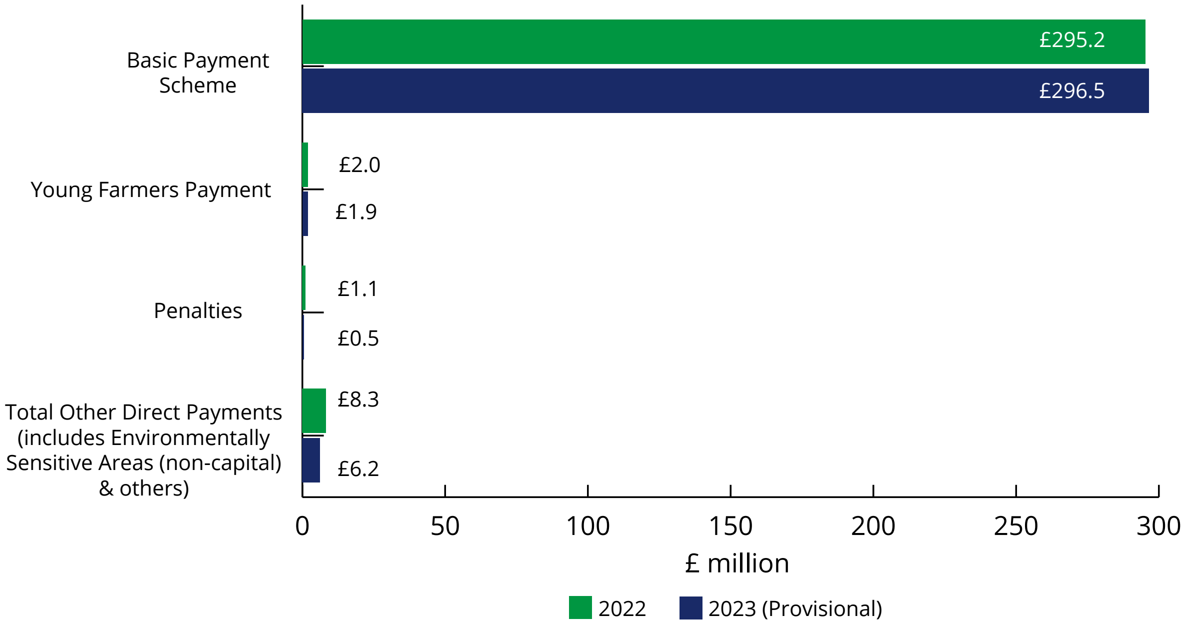
See Table 2.9 for the dataset on average market prices of breeding and store livestock.

## Subsidies

Total direct payments to farmers decreased by 0.1 per cent or £0.4 million, to £304.1 million in 2023.

The total value of the Basic and Young Farmer payments estimated to have accrued in 2023 was £298 million, an increase of 0.4 per cent or £1.1 million compared with the equivalent payments in 2022. The Basic and Young Farmer payments account for approximately 98 per cent of all direct payments.

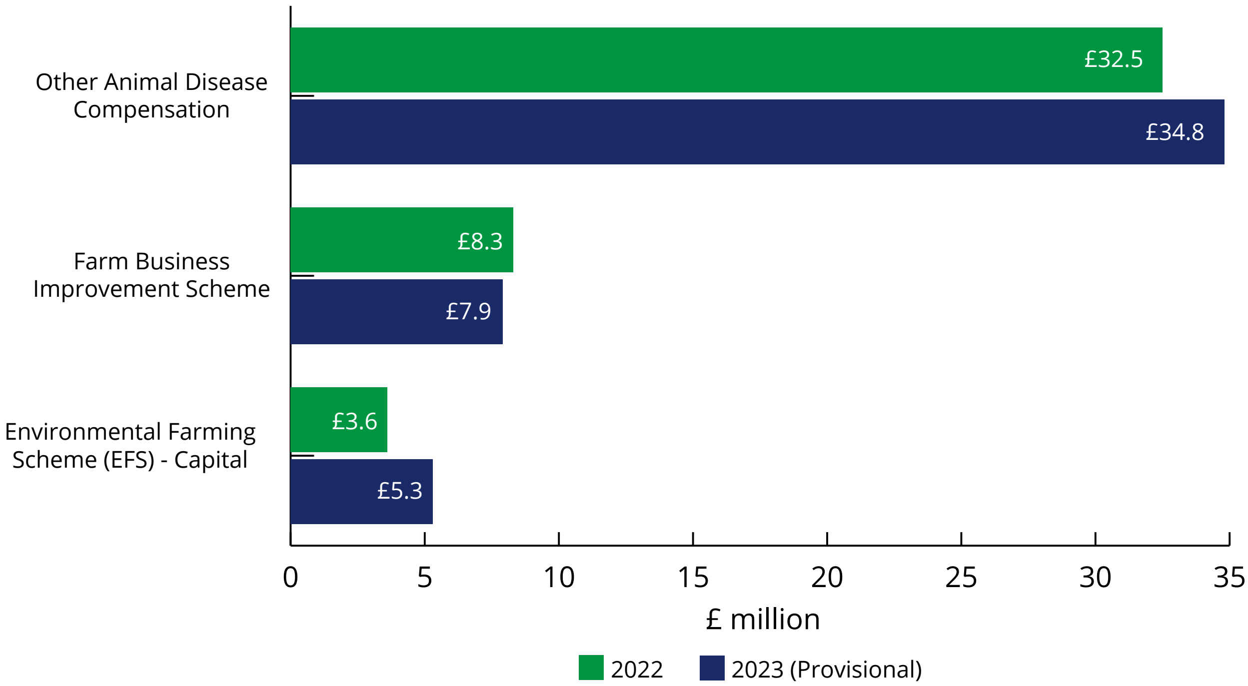
### Figure 2.7: Direct payments included in the Northern Ireland Aggregate Agricultural Account, 2022-2023




See [Table 2.10 for the full dataset on direct payments included in the Aggregate account](#).

**Total capital grants** to farmers increased by 10.3 per cent or £1.2 million, to £13.2 million in 2023, due to increases in grants from the Environmental Farming Scheme (EFS)- Capital. Whereas, **Animal Disease compensation** payments to farmers increased by 7.2 per cent or £2.3 million, to £34.8 million in 2023.

### Figure 2.8: Capital grants and other direct payments in Northern Ireland, 2022-2023

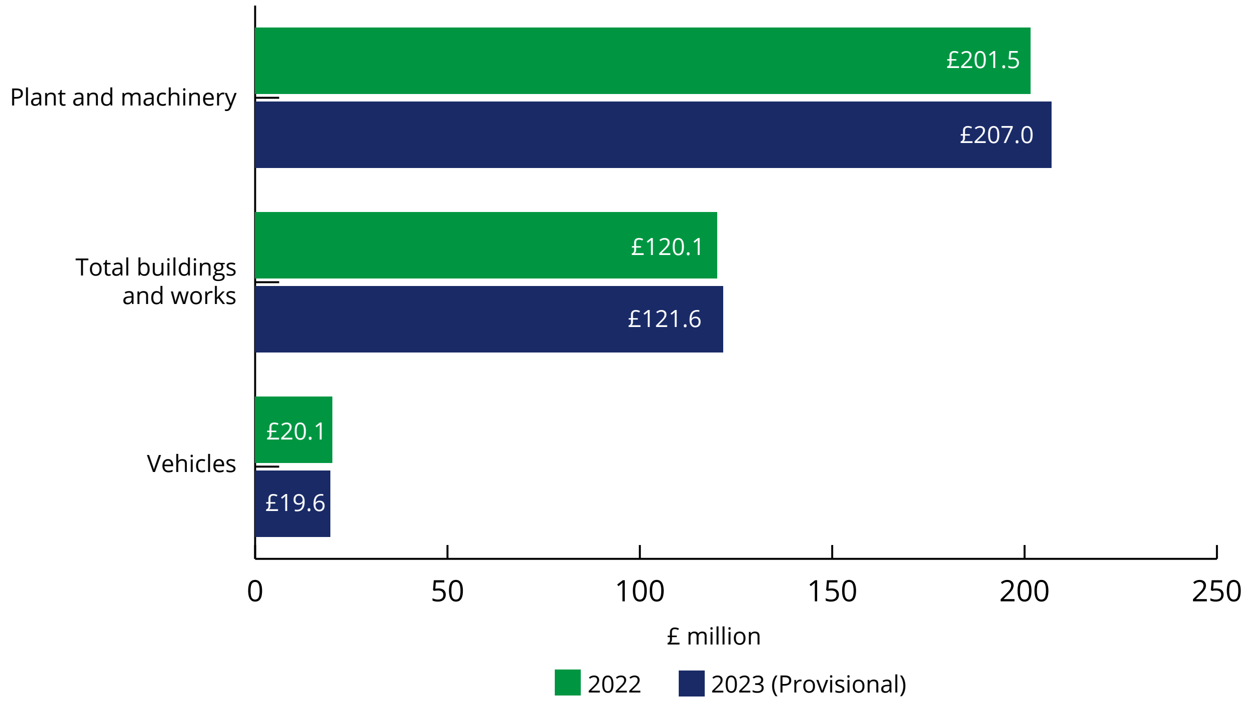



See [Table 2.11 for the full dataset on capital grants and other payments not included in the Aggregate account](#).

## Investment

**Gross annual capital investment** increased by 1.9 per cent or £6.3 million to £348 million in 2023. Within this total there was a 2.2 per cent increase in total investment in plant, machinery and vehicles, while investment in buildings and works was up by 1.2 per cent.

### Figure 2.9: Gross annual capital investment in fixed assets and equipment in Northern Ireland, 2022 -2023




See Table 2.12 for the full dataset on gross annual capital investment.

## Milk Quality

Milk quality statistics show that butterfat content increased from 4.15 per cent in 2022 to 4.19 per cent in 2023 whereas protein content increased from 3.31 per cent in 2022 to 3.32 per cent in 2023.

### Headline table on milk quality statistics in Northern Ireland, 2022-2023

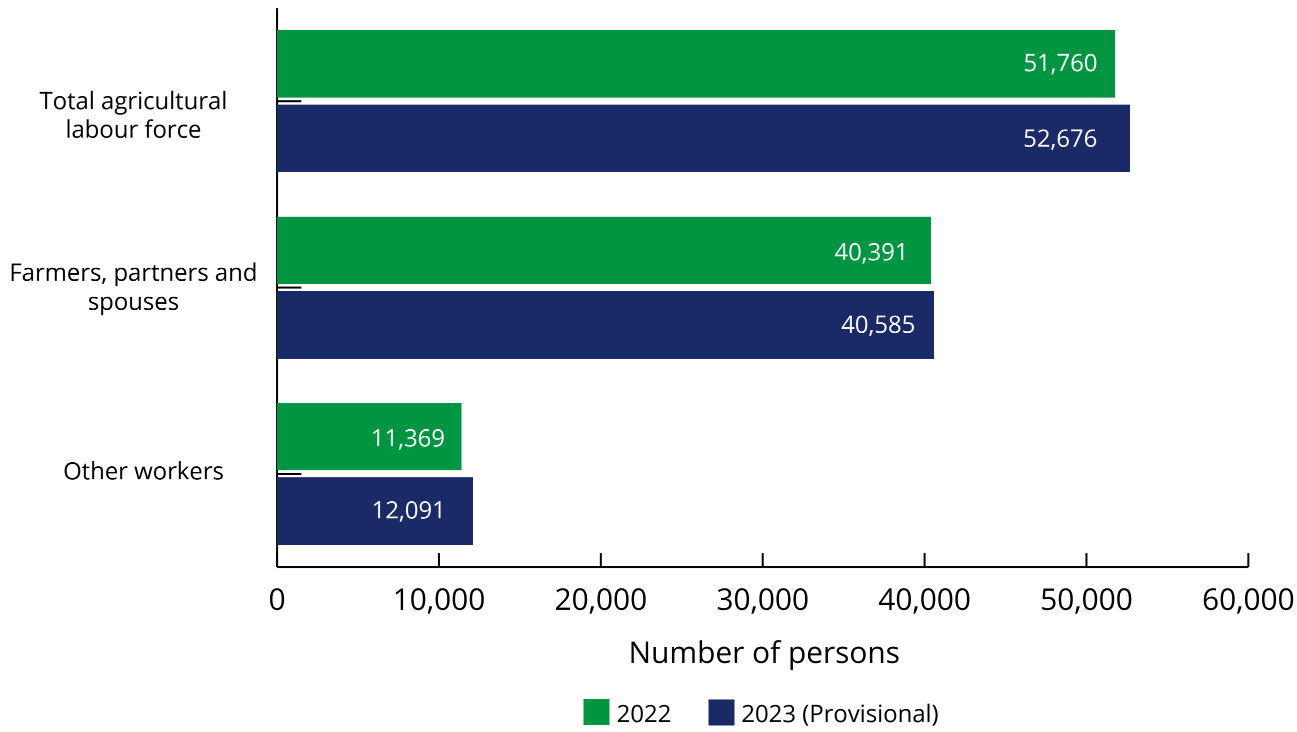
| | Unit | 2022 | 2023 |
|---|---|---|---|
| Total bacterial Count | 000’ per ml | 21 | 20 |
| Somatic cell count | 000’ per ml | 194 | 195 |
| Butterfat content | % | 4.15 | 4.19 |
| Protein content | % | 3.31 | 3.32 |
| Lactose content | % | 4.75 | 4.73 |

See Table 2.13 for the full dataset on milk quality statistics.

## Agricultural labour force

The **agricultural labour force** in 2023 increased by 1.8 per cent to 52,676 persons. Farmers, business partners, and spouses accounted for 77 per cent of the total agricultural labour force.

**Figure 2.10: Number of persons working on farms in Northern Ireland, 2022 -2023**




See Table 2.14 for the full dataset on agricultural labour force.

See Table 2.15 for the dataset on agricultural manpower.

## B. Commodities and Inputs

Key findings for 2023 compared to 2022 are as follows:

- The **value of output of cattle and calves** decreased by 6.0 per cent to £568 million.
- The **value of output of milk** decreased by 21.5 per cent to £892 million. The average **gross milk price** (before deducting transport costs) was 35.31 pence per litre, a 21.3 per cent decrease.
- Total **value of output of sheep and lambs** decreased by 0.5 per cent to £109 million.
- The **value of output from the pig sector** increased by 14.8 per cent to £297 million.
- The **value of output from the poultry sector** increased by 2.0 per cent to £380 million.
- The **value of output for eggs** increased by 47.5 per cent to £223 million.
- The **value of potatoes** output rose by 14.8 per cent to just under £31 million.
- The **value of output for barley, wheat and oats** decreased by 40.0 per cent, 35.4 per cent and 15.6 per cent respectively to £24.4 million, £13.2 million, and £2.8 million (£40.5 million in total).
- The total **value of horticultural output** decreased by 27.3 per cent to £70 million.
- The **total cost of purchased feedstuffs** increased by 4.9 per cent to £1.2 billion. The average price of feedstuffs increased by 1.6 per cent to £411 per tonne.
- The **total cost of fertiliser purchases** decreased by 42.8 per cent to £105 million.

Contact: Paul Keatley, Tel: 028 9052 4063, E-mail: Paul.Keatley@daera-ni.gov.uk

### Introduction

This sub-chapter presents data on the values, prices and quantities of outputs and inputs components from the aggregate account for Northern Ireland Agriculture. Note that the values and prices presented are at current prices (not adjusted for inflation).

### Cattle and calves

The number of clean cattle marketed during 2023 decreased by 5.5 per cent to 339,213 head. The number of steers were 8.4 per cent lower at 157,457 head, heifers decreased by 2.8 per cent to 140,618 head and the number of young bulls decreased by 3.0 per cent to 41,138. As a result, the proportion of steers in the slaughter mix decreased from 47.9 per cent in 2022 to 46.4 per cent in 2023, while the proportion of heifers increased from 40.3 per cent in 2022 to 41.5 per cent in 2023. Meanwhile, the proportion of young bulls slaughtered increased from 11.8 per cent in 2022 to 12.1 per cent in 2023.

The average dressed carcase weights decreased by 1.3 per cent in 2023 to 340.1 kg. With the decrease in cattle marketed the volume of clean beef produced decreased by 6.8 per cent to 115,363 tonnes. The average producer price paid was 10.1 per cent higher at £4.60 per kilogram deadweight. The overall result of these changes was that the sales value of finished clean cattle increased by 2.7 per cent to £531 million.

Sales of culled cows and bulls decreased by 5.5 per cent to 116,525 head in 2023. Average carcase weights for these animals was 2.3 per cent lower at 305 kg. The average price of culled cows and bulls increased by 2.5 per cent to £3.24 per kilogram deadweight. Overall, total receipts from cull cattle sales, decreased 5.3 per cent to £115.1 million in 2023.

The number of calves presented for slaughter in 2023 decreased by 21.0 per cent to 5,789 head. An estimated 91 calves were exported in 2023, which was a decrease of 73.3 per cent compared with 2022 levels. The average calf price was 11.9 per cent higher at £858 per head and the revenue generated was £5.0 million.

The number of store cattle sold outside Northern Ireland decreased by 15.0 per cent to 2,915 head in 2023. When combined with an 11.4 per cent increase in the average producer price paid to £1,016 per head, this generated revenues of £3.0 million; a decrease of 5.3 per cent from 2022 levels. The main market outlet for these store cattle was Great Britain, which accounted for 72.5 per cent of these shipments.

Overall, the value of output of cattle and calves in 2023 (which deducts the value of imported cattle but includes breeding cattle and store cattle exports) decreased by 6.0 per cent to £568 million.

### Headline figures on output of cattle and calves, Northern Ireland, 2022-2023

| | 2022 | 2023 (Provisional) |
|---|---|---|
| **Steers, heifers and young bulls** | | |
| Sales ('000 head) | 359.1 | 339.2 |
| Average producer price (p per kg dwt) | 417.7 | 460.0 |
| Average dressed carcase weight (kg) | 344.5 | 340.1 |
| Quantity of output ('000 tonnes) | 123.7 | 115.4 |
| Value of output (£m) | 516.8 | 530.6 |
| **Cows and bulls** | | |
| Sales ('000 head) | 123.3 | 116.5 |
| Average producer price (p per kg dwt) | 315.6 | 323.5 |
| Average dressed carcase weight (kg) | 312.3 | 305.2 |
| Quantity of output ('000 tonnes) | 38.5 | 35.6 |
| Value of output (£m) | 121.5 | 115.1 |

| | 2022 | 2023 (Provisional) |
|---|---|---|
| **Calves** | | |
| Sales ('000 head) | 7.3 | 5.8 |
| Average producer price (£ per head) | 766 | 858 |
| Value of output (£m) | 5.6 | 5.0 |
| **Store cattle sold outside Northern Ireland** | | |
| Marketings ('000 head) | 3.4 | 2.9 |
| Average producer price (£ per head) | 912 | 1,016 |
| Value of output (£m) | 3.1 | 3.0 |
| **Breeding cattle sold outside Northern Ireland** | | |
| Marketings ('000 head) | 0.9 | 1.0 |
| Average producer price (£ per head) | 1,850 | 1,801 |
| Value of output (£m) | 1.7 | 1.8 |
| **Less Imported cattle** | | |
| Marketings ('000 head) | 34.3 | 33.9 |
| Average producer price (£ per head) | 1,164 | 1,152 |
| Value of output (£m) | 39.9 | 39.0 |
| **Total Market Value (£m)** | **608.8** | **616.3** |
| Stock change due to volume (£m) | -3.9 | -47.8 |
| **Total value of output (£m)** | **604.9** | **568.5** |

See Table 2.16 for the full dataset on output of cattle and calves.

### Headline figures on sources of home-fed finished cattle marketed in Northern Ireland, 2022-2023

Per cent

| | 2022 | 2023 (Provisional) |
|---|---|---|
| **Cows and bulls** | 26 | 26 |
| **Steers and heifers originating from:** | | |
| - the dairy herd; | 37 | 39 |
| - the beef herd; | 29 | 30 |
| - calves and stores imported from the Republic of Ireland or shipped from Great Britain | 10 | 6 |
| **Total** | **100** | **100** |
| **Total number marketed ('000 head)** | **482** | **456** |

See Table 2.17 for the full dataset on sources of home-fed finished cattle.

## Milk

The annual average dairy cow population in 2023 was 0.4 per cent higher than 2022 at 319,297 head. Average gross milk yield per cow decreased from 8,061 litres in 2022 to 8,013 litres in 2023; a 0.6 per cent decrease.

The lower milk yields contributed to a 0.2 per cent decrease in total milk output for 2023 in Northern Ireland; to 2.5 billion litres. The average gross milk price for 2023 (before deducting transport costs) was 35.31 pence per litre, a 21.3 per cent decrease.

Overall, the value of output of milk decreased by 21.5 per cent in 2023, to £892 million.

### Headline figures on output of milk, Northern Ireland, 2022-2023

| | 2022 | 2023 (Provisional) |
|---|---|---|
| Annual average number of dairy cows ('000 head) | 317.9 | 319.3 |
| Average gross yield per cow (to nearest 10 litres per annum) | 8,061 | 8,013 |
| Total output of milk for human consumption (million litres) | 2,533 | 2,528 |
| Average producer price (pence per litre) | 44.86 | 35.31 |
| **Value of output (£m)** | **1,136.2** | **892.4** |

See Table 2.18 for the full dataset on output of milk.

## Sheep and lambs

Marketings of clean sheep and lambs increased by 4.0 per cent to 782,185 head in 2023, whereas, the average dressed carcase weight decreased by 1.9 per cent in 2023 to 21.6 kg per head. As a result, the volume of clean sheep meat produced during 2023 increased by 2.0 per cent to 16,905 tonnes. Clean sheep and lamb producer prices increased by 2.8 per cent to 550 pence per kg deadweight in 2023. The combined volume and price changes meant that the total market value of clean sheep and lambs increased by 4.8 per cent to £93 million.

Marketings of culled ewes and rams decreased by 8.1 per cent to 141,786 head in 2023. There was a 8.5 per cent decrease in the price received for these animals (£79 per head). These changes resulted in the value of market receipts for culled ewes and rams decreasing to £11.2 million; a decrease of 15.9 per cent.

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 0.5 per cent, to £109 million in 2023.

### Headline figures on output of sheep, Northern Ireland, 2022-2023

| | 2022 | 2023 (Provisional) |
|---|---|---|
| **Marketings ('000 head)** | | |
| Finished sheep and lambs | 752.3 | 782.2 |
| Culled ewes and rams | 154.3 | 141.8 |
| **Average price (p per kg deadweight)** | | |
| Finished sheep and lambs | 535.2 | 550.3 |
| Culled ewes and rams | 318.1 | 296.9 |
| **Average dressed carcase weight (kg)** | | |
| Finished sheep and lambs | 22.0 | 21.6 |
| Culled ewes and rams | 27.1 | 26.6 |
| **Quantity of Output ('000 tonnes)** | | |
| Finished sheep and lambs | 16.6 | 16.9 |
| Culled ewes and rams | 4.2 | 3.8 |
| **Market Value (£m)** | **105.7** | **108.8** |
| Stock change due to volume (£m) | +3.6 | 0.0 |
| **Value of output (£m)** | **109.3** | **108.8** |

See Table 2.19 for the full dataset on output of sheep.

## Pigs

The number of clean pigs slaughtered in 2023 was 4.4 per cent lower at 1.49 million head. Average dressed carcase weights were 0.9 per cent higher at 95.0kg in 2023. When combined these changes resulted in a 3.6 per cent decrease in the quantity of pigmeat produced to 141,815 tonnes. Pig producer prices increased by 20.4 per cent to 215 pence per kg deadweight. As a result, the output from clean pig production was 16.0 per cent higher at £305 million.

Marketings of cull sows and boars were down by 7.9 per cent in 2023 at 14,418 head. The estimated market returns for these animals was £2.8 million in 2023. Overall, the value of output from the pig sector increased by 14.8 per cent to £297 million (this figure includes deductions for the value of imported pigs and additions for the value of breeding and store pig exports).

### Headline figures on output of pigs, Northern Ireland, 2022-2023

| | 2022 | 2023 (Provisional) |
|---|---|---|
| **Marketings ('000 head)** | | |
| Finished clean pigs | 1,561.7 | 1492.3 |
| Culled sows and boars | 15.7 | 14.4 |
| **Average price (p per kg deadweight)** | | |
| Finished clean pigs | 178.52 | 214.9 |
| Culled sows and boars | 116.84 | 136.9 |
| **Average dressed carcase weight (kg)** | | |
| Finished clean pigs | 94.2 | 95.0 |
| **Quantity of output ('000 tonnes)** | | |
| Finished clean pigs | 147.1 | 141.8 |
| Culled sows and boars | 2.2 | 2.0 |
| **Market value (£m)** | **258.5** | **299.1** |
| Stock change due to volume (£m) | +0.7 | -1.7 |
| **Value of output (£m)** | **259.1** | **297.5** |

See Table 2.20 for the full dataset on output of pigs.

## Poultry

In 2023, the total volume of poultry meat production was 324,589 tonnes liveweight, an increase of 7.8 per cent from 2022 levels. Broiler production was 8.1 per cent higher at 304,334 tonnes liveweight. Broiler producer prices were lower than 2022 levels by 3.2 per cent at 116 pence per kg. Overall, as a result of these changes the market value of broilers in 2023 was 4.7 per cent higher at £352 million. Broilers accounted for 93 per cent of the total market value of the poultry sector.

Turkey production increased in 2023, by 11.7 per cent, to 3,231 tonnes liveweight.

The value of output from the poultry sector in 2023 was £380 million; 2.0 per cent higher than 2022.

### Headline figures on output of poultry, Northern Ireland, 2022-2023

| | 2022 | 2023 (Provisional) |
|---|---|---|
| **Poultrymeat production ('000 tonnes liveweight)** | | |
| All poultrymeat (including broilers) | 301.1 | 324.6 |
| Broilers | 281.5 | 304.3 |
| **Average producer price (p per kg liveweight)** | | |
| All poultrymeat (including broilers) | 113.8 | 110.6 |
| Broilers | 119.5 | 115.8 |
| **Market value** | | |
| All poultry (£m) | 372.4 | 379.7 |
| of which broilers | 336.6 | 352.3 |
| Stock change due to volume (£m) | +0.3 | +0.7 |
| **Value of Output (£m)** | **372.7** | **380.3** |

See Table 2.21 for the full dataset on output of poultry.

## Eggs

Packing station throughput of graded eggs was estimated at 158 million dozen eggs in 2023. This was an increase of 6.4 per cent on 2022 levels. The proportion of throughput attributed to free range management systems in 2023 was relatively unchanged from 2022 at 80.2 per cent, whereas eggs originating from intensive systems accounted for 19.8 per cent of throughput.

The average producer price of eggs increased by 43.0 per cent, to 134 pence per dozen. Overall, the value of output for eggs increased by 47.5 per cent to £223 million (this figure includes eggs for processing, unrecorded sales for human consumption and duck eggs).

### Headline figures on output of eggs, Northern Ireland, 2022-2023

| | 2022 | 2023 (Provisional) |
|---|---|---|
| Graded packing station throughput (million dozen) | 148.4 | 157.9 |
| Average producer price (p per dozen) | 93.66 | 133.9 |
| **Value of output (£m)** | **151.2** | **222.9** |

See Table 2.22 for the full dataset on output of eggs.

## Potatoes

The area of potatoes planted in 2023 decreased by 6.5 per cent to 3,258 hectares. The average yield decreased, by 4.5 per cent, to 44 tonnes per hectare. As a result of these changes the total quantity of potatoes harvested in 2023 is estimated to be 10.8 per cent lower at 142,244 tonnes.

Marketings of ware potatoes during 2023 were 7 per cent lower at 103,018 tonnes. In 2023, the volume of seed potato output (including home-saved seed) decreased by 11 per cent to 8,222 tonnes. In total for 2023, the volume of potato output (including ware, seed and stockfeed potatoes) was 127,747 tonnes. This was a decrease of 7 per cent.

The average price of ware potatoes was £270 per tonne in 2023, an increase of 32 per cent from 2022 levels. The average price of seed potatoes was higher than 2022 at £199 per tonne. Overall, the total value of potato output rose in 2023, by 14.8 per cent, to just under £31 million.

### Headline figures on potatoes production, Northern Ireland, 2022-2023

| | 2022 | 2023 (Provisional) |
|---|---|---|
| **Potatoes** | | |
| Area ('000 hectares) | 3.5 | 3.3 |
| Harvestable yield (tonnes per hectare) | 45.7 | 43.7 |
| Production ('000 tonnes) | 159.4 | 142.2 |
| of which: | | |
| saleable potatoes | 139.5 | 123.6 |
| chats and waste | 19.9 | 18.6 |

See Table 2.23 for the full dataset on cereals production.

### Headline figures on output of potatoes, Northern Ireland, 2022-2023

| | 2022 | 2023 (Provisional) |
|---|---|---|
| **Potatoes Quantity of output ('000 tonnes)** | | |
| Ware | 110.5 | 103.0 |
| Seed | 9.3 | 8.2 |
| Stockfeed | 17.8 | 16.5 |
| **Total** | **137.6** | **127.7** |
| **Average producer price (£ per tonne)** | | |
| Ware | 204.30 | 269.61 |
| Seed | 184.57 | 199.17 |
| **Market Value (£m)** | | |
| Ware | 22.6 | 27.8 |
| Seed | 1.7 | 1.6 |
| Stockfeed | 0.6 | 0.4 |
| **Total** | **24.9** | **29.8** |
| Stock change due to volume (£m) | +1.8 | +0.8 |
| **Value of output (£m)** | **26.7** | **30.6** |

See Table 2.24 for the full dataset on output of potatoes.

## Cereals

The area of spring barley sown in 2023 was 1.8 per cent lower than 2022 levels at 13,113 hectares, while recorded yields were down by 25.7 per cent. As a consequence, production of spring barley decreased by 27.1 per cent to 57,112 tonnes. The area of winter barley sown, in 2023, was down by 3.1 per cent to 8,340 hectares, while yields were down by 6.9 per cent. These changes resulted in the production of winter barley decreasing by 9.8 per cent to 54,184 tonnes. Overall, total barley production was 19.6 per cent lower in 2023 at 111,295 tonnes, with the total area of barley grown down 2.3 per cent at 21,453 hectares and yields down 17.7 at 5.19 tonnes per hectare.

The total volume of barley sold or used on-farm in 2023 was 8.3 per cent lower at 127,690 tonnes. The average producer price of barley decreased, by 26.0 per cent, to £218 per tonne. These changes plus a decrease in stocks resulted in the value of barley output decreasing by 40.0 per cent to £24.4 million.

The area of wheat grown in 2023 was 3.7 per cent lower at 8,309 hectares. This coupled with a 12.2 per cent decrease in yields resulted in production being down by 15.5 per cent to 57,094 tonnes.

In 2023, the volume of wheat sold or used on-farm was 2.2 per cent lower at 61,392 tonnes, while the price per tonne of wheat decreased by 23.9 per cent to £231 per tonne. These changes plus a decrease in stocks contributed to the value of wheat output decreasing by 35.4 per cent to £13.2 million.

The area of oats grown in 2023 was 2.6 per cent lower at 1,922 hectares with yields decreasing by 9.6 per cent. This resulted in oats production decreasing by 11.9 per cent to 10,794 tonnes. The average producer price of oats was 2.8 per cent lower at £263 per tonne. The changes in price and production plus stock changes resulted in the value of oat output decreasing by 15.6 per cent to £2.8 million.

### Headline figures on output of cereals, Northern Ireland, 2022-2023

| | 2022 | 2023 (Provisional) |
|---|---|---|
| **Barley** | | |
| Area ('000 hectares) | 22.0 | 21.5 |
| Yield (tonnes per hectare) | 6.30 | 5.19 |
| Production ('000 tonnes) | 138.4 | 111.3 |
| **Wheat** | | |
| Area ('000 hectares) | 8.6 | 8.3 |
| Yield (tonnes per hectare) | 7.83 | 6.9 |
| Production ('000 tonnes) | 67.5 | 57.1 |
| **Oats** | | |
| Area ('000 hectares) | 2.0 | 1.9 |
| Yield (tonnes per hectare) | 6.21 | 5.6 |
| Production ('000 tonnes) | 12.3 | 10.8 |

See Table 2.23 for the full dataset on cereals production.

### Headline figures on output of barley and wheat, Northern Ireland, 2022-2023

| | 2022 | 2023 (Provisional) |
|---|---|---|
| **Barley** | | |
| Quantity of output ('000 tonnes) | 139.2 | 127.69 |
| Average producer price (£ per tonne) | 293.88 | 217.54 |
| **Market Value (£m)** | **40.9** | **27.8** |
| Stock change due to volume (£m) | -0.2 | -3.4 |
| **Value of output (£m)** | **40.7** | **24.4** |
| **Wheat** | | |
| Quantity of output ('000 tonnes) | 62.8 | 61.4 |
| Average producer price (£ per tonne) | 303.26 | 230.64 |
| **Market Value (£m)** | **19.0** | **14.2** |
| Stock change due to volume (£m) | +1.4 | -0.9 |
| **Value of output (£m)** | **20.5** | **13.2** |

See Table 2.24 for the full dataset on output of cereals.

## Horticulture

The total value of horticultural output in 2023 decreased by 27.3 per cent to £70 million. Returns from the sale of fruit (mainly apples) decreased by 39.0 per cent to £10.8 million. Apple production decreased by 2.2 per cent to 47,834 tonnes while prices decreased by 42.4 per cent. Overall, the market value of apples decreased by 43.7 per cent to £9.3 million. The value of output from mushrooms decreased by 8.3 per cent to £26 million as a result of a 15.2 per cent decrease in production and a price increase of 8.0 per cent. Receipts from the sale of vegetables decreased by 8.1 per cent to £19.5 million. The output value of ornamental and hardy nursery stock fell by 53.0 per cent to £13.6 million.

### Headline figures on output of apples and mushrooms, Northern Ireland, 2022-2023

| | 2022 | 2023 (Provisional) |
|---|---|---|
| **Apple** | | |
| Quantity of output ('000 tonnes) | 48.9 | 47.8 |
| Average producer price (£ per tonne) | 338 | 195 |
| **Market value (£m)** | **16.5** | **9.3** |
| Stock change due to volume (£m) | -0.2 | 0.0 |
| **Value of Output (£m)** | **16.4** | **9.3** |

| | 2022 | 2023 (Provisional) |
|---|---|---|
| **Mushrooms** | | |
| Quantity of output ('000 tonnes) | 16.4 | 13.9 |
| Average producer price (£ per tonne) | 1,740 | 1,880 |
| **Value of output (£m)** | **28.6** | **26.2** |

See Table 2.25 for the full dataset on output of apples and mushrooms.

## Feedstuffs

The total volume of all compound feedstuffs purchased during 2023 was 3.3 per cent higher than the 2022 levels at 2.56 million tonnes. Within this total, the purchased volumes of all cattle (and calf) compounds increased by 1.0 per cent with dairy compounds purchased increasing by 1.5 per cent and beef cattle compounds decreasing by 6.0 per cent. The volume of sheep compounds purchased were 6.3 per cent higher. Total purchases of pig compounds fell in 2023 by 8.4 per cent while poultry compounds increased by 8.6 per cent.

Inputs of straights (including home-fed cereals) rose by 2.4 per cent in 2023 to 397,526 tonnes. In total, the volume of all feed purchased was 3.3 per cent higher in 2023 at 3.0 million tonnes. The average price of feedstuffs (compounds and home-fed cereals) increased, by 1.6 per cent, to £411 per tonne in 2023. Overall, the cost of purchased feedstuffs in 2023 increased by 4.9 per cent, to £1.2 billion.

### Headline figures on quantity and cost of feedstuffs, Northern Ireland, 2022-2023

| | 2022 | 2023 (Provisional) |
|---|---|---|
| **Feedstuffs** | | |
| Total quantity purchased ('000 tonnes concentrate equivalent) | 2,918 | 3,016 |
| of which : Non-concentrates ('000 tonnes) | 51 | 59 |
| Compounds ('000 tonnes) | 2,479 | 2,560 |
| Straights & cereals fed on-farm ('000 tonnes) | 388 | 398 |
| Average cost (£ per tonne concentrate equivalent) | 404 | 411 |
| **Value of feed consumed (£m)** | **1,179.8** | **1,237.5** |

See Table 2.26 for the full dataset on quantity and cost of feedstuffs.

## Fertilisers and lime

The quantity of fertilisers purchased in 2023 decreased by 14.2 per cent to 220,812 tonnes while the average price decreased by 33.3 per cent to £477 per tonne. In volume terms, 54 per cent of total fertiliser sales were straights, while 46 per cent were compounds.

As a result of these movements in both quantity purchased and price paid, the total value of fertiliser purchases decreased, by 42.8 per cent, to £105.3 million.

Total expenditure on lime decreased by 35.9 per cent when compared to 2022 levels to £6.5 million. The quantity purchased decreased by 50.2 per cent to 125,771 tonnes while the price paid increased by 28.9 per cent.

### Headline figures on quantity and cost of fertilisers and lime, Northern Ireland, 2022-2023

| | 2022 | 2023 (Provisional) |
|---|---|---|
| **Fertilisers** | | |
| Quantity purchased ('000 tonnes product) | 257 | 221 |
| Average cost (£ per tonne) | 715 | 477 |
| **Value of purchases (£m)** | **184.0** | **105.3** |
| **Lime** | | |
| Quantity purchased ('000 tonnes) | 253 | 126 |
| Average cost (£ per tonne) | 39.99 | 51.53 |
| **Value of purchases (£m)** | **10.1** | **6.5** |

See Table 2.26 for the full dataset on quantity and cost of fertilisers and lime.

## Marketing expenses

In 2023 total marketing expenses were 0.2 per cent lower than 2023 levels at £40.0 million. Cattle marketing expenses were £24.1 million, while sheep expenses were £4.2 million. Marketing expenses for milk were £6.3 million, while those for pigs were £5.4 million.

### Headline figures on marketing expenses, Northern Ireland, 2022-2023

*£ million*

| | 2022 | 2023 (Provisional) |
|---|---|---|
| **Marketing expenses** | | |
| Cattle | 24.4 | 24.1 |
| Sheep | 4.1 | 4.2 |
| Pigs | 5.5 | 5.4 |
| Milk | 6.1 | 6.3 |
| **Total** | **40.1** | **40.0** |

See Table 2.26 for the full dataset on marketing expenses.

## Machinery expenses

Machinery expenses in 2023 decreased, by 2.5 per cent, to £199.5 million. This decrease was driven by a 9.7 per cent decrease in fuel and oil costs, reflecting global price commodity movements.

### Headline figures on machinery expenses, Northern Ireland, 2022-2023

| | 2022 | 2023 (Provisional) |
|---|---|---|
| Total machinery expenses (excl. depreciation) | 204.6 | 199.5 |

See Table 2.1 for the full dataset on machinery expenses.

## Interest

Total farm borrowings in 2023 decreased by 5.0 per cent. The average cost of borrowing is estimated to have increased from 5.44 per cent in 2022 to 8.68 per cent in 2023. As a result, the total interest bill (including FISIM) increased by 47.7 per cent in 2023 to £90.3million.

Financial intermediaries (mainly banks) charge explicit commissions and fees for their services to customers, as well as implicit ones by paying and charging different rates of interest to borrowers and lenders. The revenue from the margin on lending and borrowing by financial intermediaries is described as financial intermediation services indirectly measured (FISIM). The inclusion of FISIM in the account is in line with recommended EU national accounting conventions. It is a reallocation to gross output of part of the interest paid by farmers. While the inclusion of FISIM will increase intermediate consumption and decrease gross value added, it will decrease, by the same amount, the figure shown for interest paid and consequently this change in methodology has no impact on total income from farming.

### Headline figures on bank interest, Northern Ireland, 2022-2023

| | 2022 | 2023 (Provisional) |
|---|---|---|
| **Interest** | | |
| Bank base lending rate (%) | 1.5 | 4.7 |
| **Total interest charges (£m)** | **61.2** | **90.3** |

See Table 2.26 for the full dataset on interest charges.

## Labour

In 2023, the volume of paid labour input (excluding labour used on capital projects) was 10.7 per cent higher, at 8.75 million hours. The cost of paid labour was 22.4 per cent higher than 2022 at £103.2 million.

### Headline figures on quantity and cost of labour, Northern Ireland, 2022-2023

| | 2022 | 2023 (Provisional) |
|---|---|---|
| **Labour** | | |
| Volume of paid labour (million hours) | 7.90 | 8.75 |
| **Value of paid labour (£m)** | **84.3** | **103.2** |

See Table 2.26 for the full dataset on labour.

# 3. Crop Areas and Livestock Numbers

## Summary


Key findings for 2023 compared to 2022 are as follows:

- **Farms:** In June 2023 there were 26,131 farms in Northern Ireland with approximately one million hectares (1,042,318 hectares) of land farmed, similar to 2022 (26,089).
- **Cattle:** Total cattle numbers have decreased by less than 1 per cent to 1,673,345. The number of dairy cows remained relatively consistent at 319,346, while the number of beef cows fell by 4% to 236,082.
- **Sheep:** There was a decrease of 2 per cent in breeding ewes compared to 2022, with numbers falling to 973,718. Overall, the total number of sheep recorded was approximately 2 million, which was a 3 per cent fall from June 2022.
- **Poultry:** Total poultry numbers on farms at June 2023 increased by 24 per cent from 2022 levels with 25.6 million birds recorded. An alteration in animal health factors, which positively affected production, drove the change in the sector. Total number of laying birds saw an increase of 11 per cent whilst broiler numbers increased by over 31 per cent and other poultry by almost 294 per cent compared to June 2022.
- **Pigs:** Total pig numbers recorded in June 2023 decreased by 8 per cent to 682,339 compared to June 2022.
- **Crop areas:** The total area of crops grown in Northern Ireland in 2023 was 47,777 hectares, a decrease of less than 1 per cent from 2022.
- **Cereals:** The total area of cereals (31,803 hectares) grown in 2023 decreased by 3 per cent from 2022. Wheat crops decreased by 4 per cent to 8,309 hectares, Winter and Spring Barley decreased by just over 3 per cent and 2 per cent respectively, while Oats decreased by 3 per cent from 2022, at 1,922 hectares.


Contact: Danielle Clarke, Tel. 028 9037 8559, E-mail: Danielle.clarke@daera-ni.gov.uk

## Introduction

The data in this chapter are sourced from the Agricultural Census which is conducted in June each year. The statistics are compiled from a survey of farm businesses augmented by administrative data *(Northern Ireland Farm Information System NIFAIS, cattle tracing system)*. The statistics provide robust estimates of crop areas, numbers of livestock and of farmers and workers on active farm businesses on the survey date of 1st June 2023. The population of farms to which these statistics refer includes all active farm businesses having one or more hectare 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.

## Land use

Approximately 77 per cent of the total Northern Ireland land area of 1.35 million hectares is used for agriculture, including common rough grazing. Around 9 per cent of the total land area is used for forestry (Table 3.1). The greater part (53 per cent) of the total forested area (118,000 hectares) is managed by the Forest Service of the Department of Agriculture, Environment and Rural Affairs (see F*orest Service Annual Report, 2022/2023*[1]).

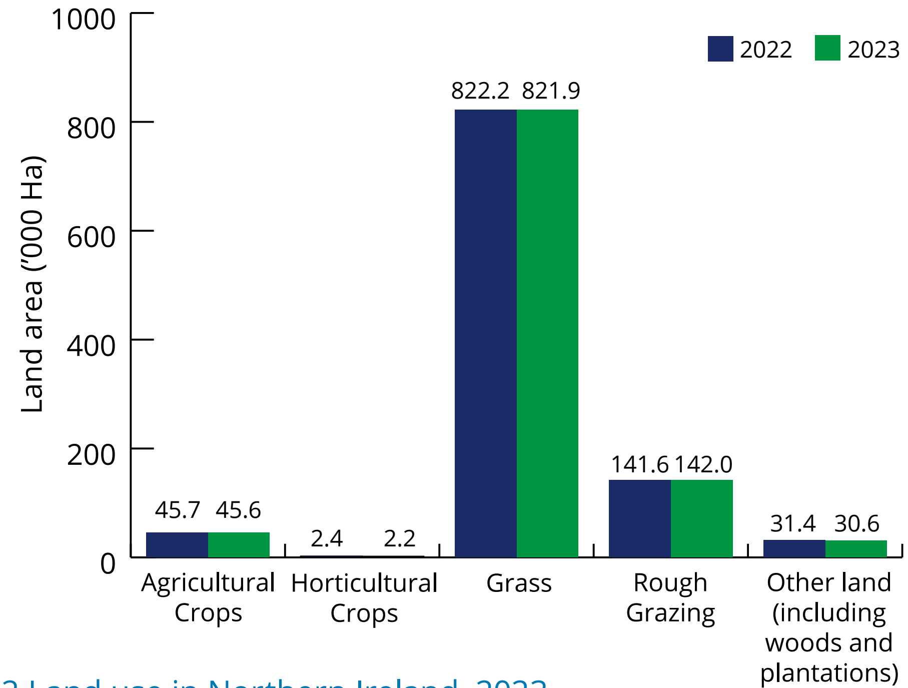
### Headline figures for land use in Northern Ireland, 2023 (thousand hectares)

| | Crops | Grass and rough grazing | Woodland | Other land | Total land area |
|---|---|---|---|---|---|
| Farms | 48 | 964 | 19 | 11 | 1,042 |
| Common grazing | - | 35 | - | - | 35 |
| NI Forest Service | - | - | 62 | 13 | 75 |
| Other areas | - | - | 38 | 163 | 201 |
| **All land** | **48** | **1,000** | **118** | **187** | **1,353** |

See Table 3.1 Land use in Northern Ireland, 2023.

Most farmland in Northern Ireland is under grass (78.9 per cent). Arable or horticultural crops occupy 47,777 hectares and make up just 4.6 per cent of the total area farmed. Barley (21,453 hectares) is the main crop grown followed by wheat with 8,309 hectares. The total area of cereals grown (31,803 hectares) was 2.7 per cent less in 2023 than in 2022. In 2023, the area of potatoes grown was 6.5 per cent less than 2022 levels at 3,258 hectares. In 2023, the cropped area also included 2,189 hectares of horticultural crops, mainly fruit orchards (1,260 hectares) and vegetables (822 hectares).

### Figure 3.1: Land use, Northern Ireland, 2022-2023 (thousand hectares)




See Table 3.2 Land use in Northern Ireland, 2023.

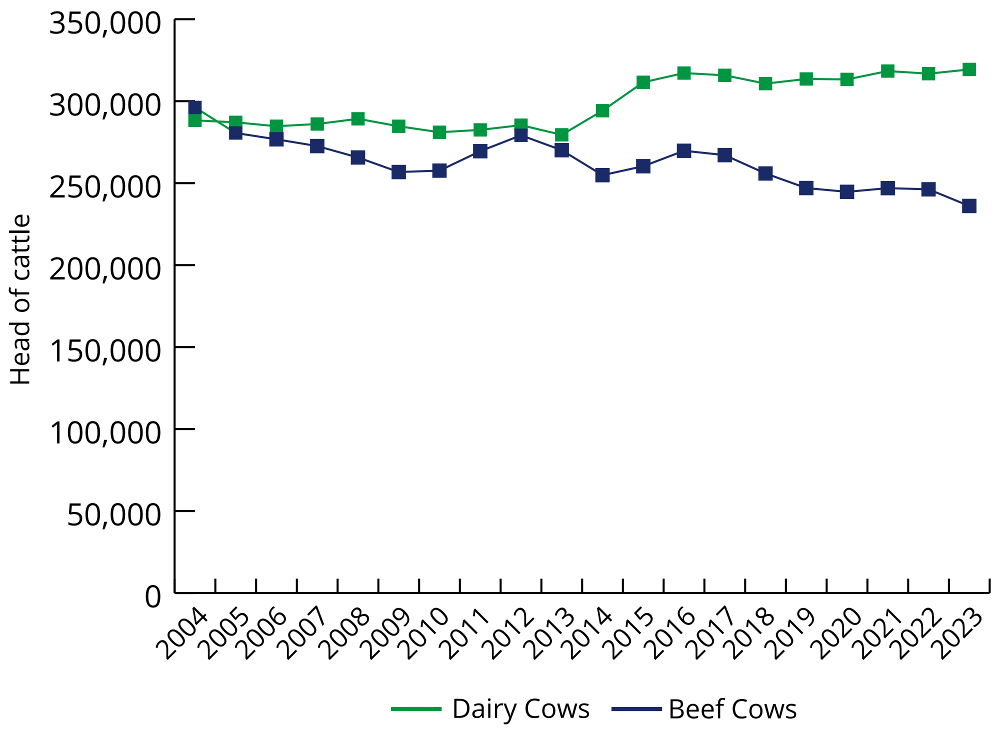
1 Available on the DAERA website at www.daera-ni.gov.uk/publications/forest-service-annual-reports

## Grazing livestock

All but 7.7 per cent of Northern Ireland farms keep cattle or sheep. In 2023, cattle were present on 20,341 farms (77.8 per cent), sheep on 9,921 farms (38.0 per cent) and cattle and/or sheep on 24,110 farms (92.3 per cent).

**Cattle:** The total number of cattle on farms at the time of the June 2023 Agricultural Census was lower than in 2022 at approximately 1.7 million, a decrease of 0.8 per cent. The number of beef cows decreased by just over 4 per cent to 236,082 and the number of dairy cows increased by less than 1 per cent to 319,346. The total cattle population peaked in 1998 at 1.8 million before gradually falling to just under 1.6 million in 2009. Since then, the total number has remained relatively stable.

**Figure 3.2: Number of beef and dairy cows, Northern Ireland 2004-2023**



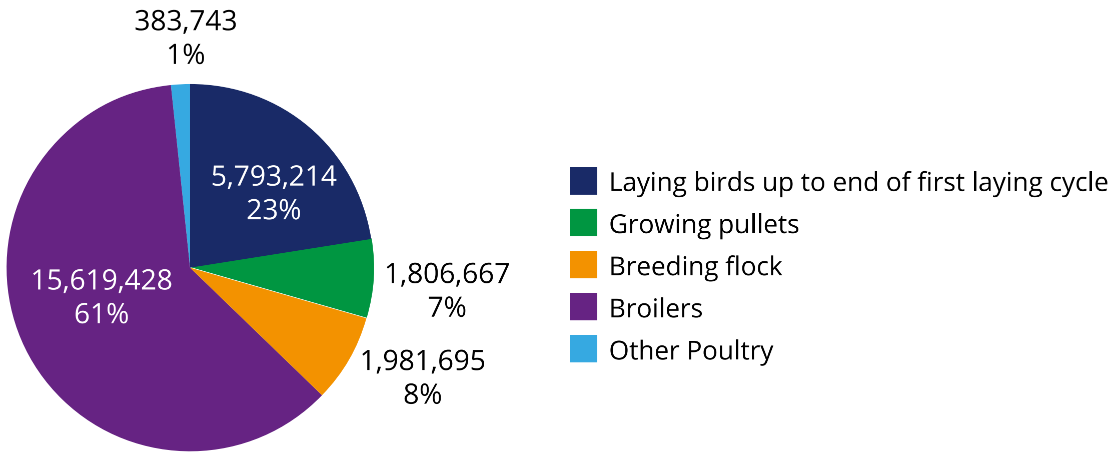

See Table 3.3 Livestock numbers in Northern Ireland, June 2018-2023.

## Intensive livestock

In Northern Ireland, pigs and/or poultry (for commercial purposes) are present on 5.2 per cent of farms.

**Poultry:** Total poultry numbers increased by 23.9 per cent from 2022 with 25.6 million birds recorded in 2023. Total number of laying birds (9.6 million) saw an increase of 10.8 per cent whilst broiler numbers (15.6 million) increased by over 31.2 per cent and other poultry by almost 294 per cent compared to June 2022.

## Figure 3.3: Number of Poultry, Northern Ireland 2023

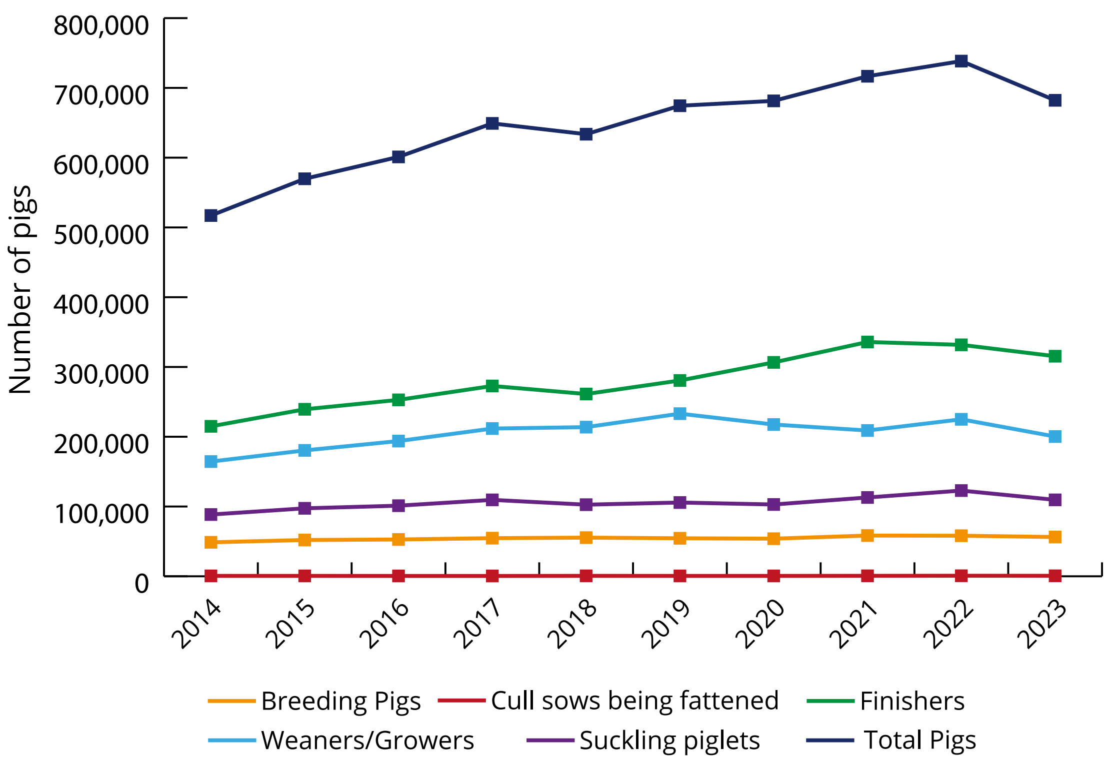



See Table 3.3 Livestock numbers in Northern Ireland, June 2018-2023.

**Pigs:** There has been a decrease in total pig numbers recorded on the farm census in June 2023 of 7.6 per cent to 682,339 from 738,540 in 2022. The decrease in pig numbers was primarily due to a reduced number of weaners, growers and suckling piglets.

In comparison to 2022, the total breeding herd (including breeding sows, gilts in pig, maiden gilts, and boars) fell to 56,274 (58,130 in 2022). The number of Weaners and Growers fell by almost 11.0 per cent to 200,309 and suckling piglets fell by 10.8 per cent to 109,527. The number of female breeding pigs (breeding sows and gilts in pig) increased by 2.5 per cent to 47,843 in 2023.

## Figure 3.4: Type of Pigs, Northern Ireland 2014 - 2023




See Table 3.3 Livestock numbers in Northern Ireland, June 2018-2023.

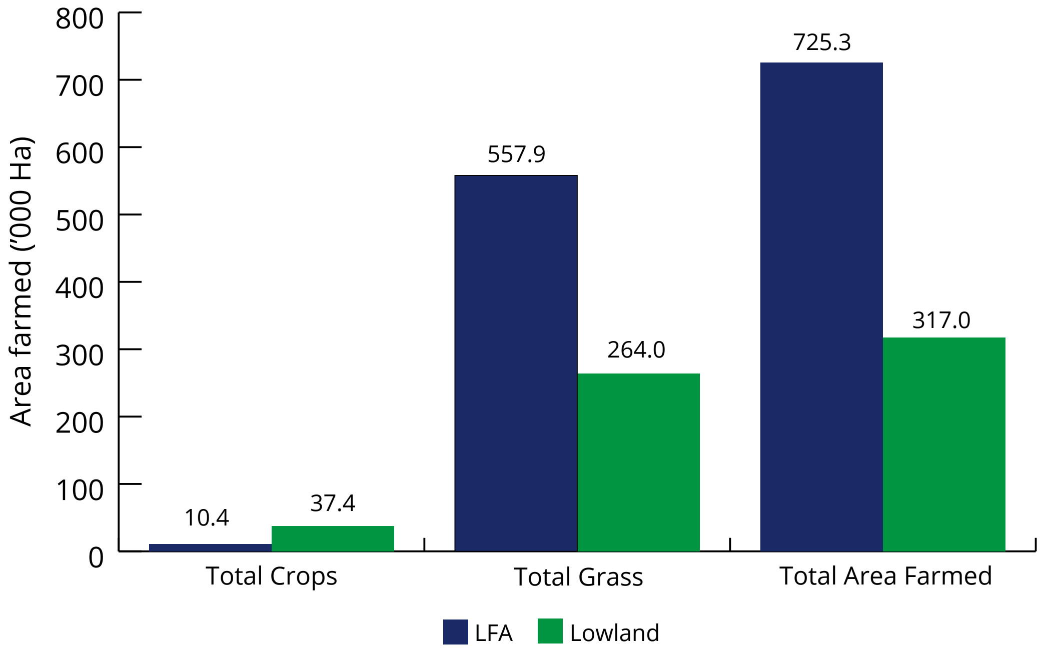
Most pigs are concentrated in relatively few farms, with units of more than 200 sows on 1st June 2023 accounting for 17.6 per cent of herds but 79.3 per cent of total breeding sows.

## 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, were designated as such under EU legislation. Further details are given in the Appendix.

Farms classed as LFA farms occupy 69.6 per cent of farmed land in Northern Ireland and livestock farming predominates. Crops occupy 11.8 per cent of land on lowland farms compared with only 1.4 per cent in the case of LFA farms.

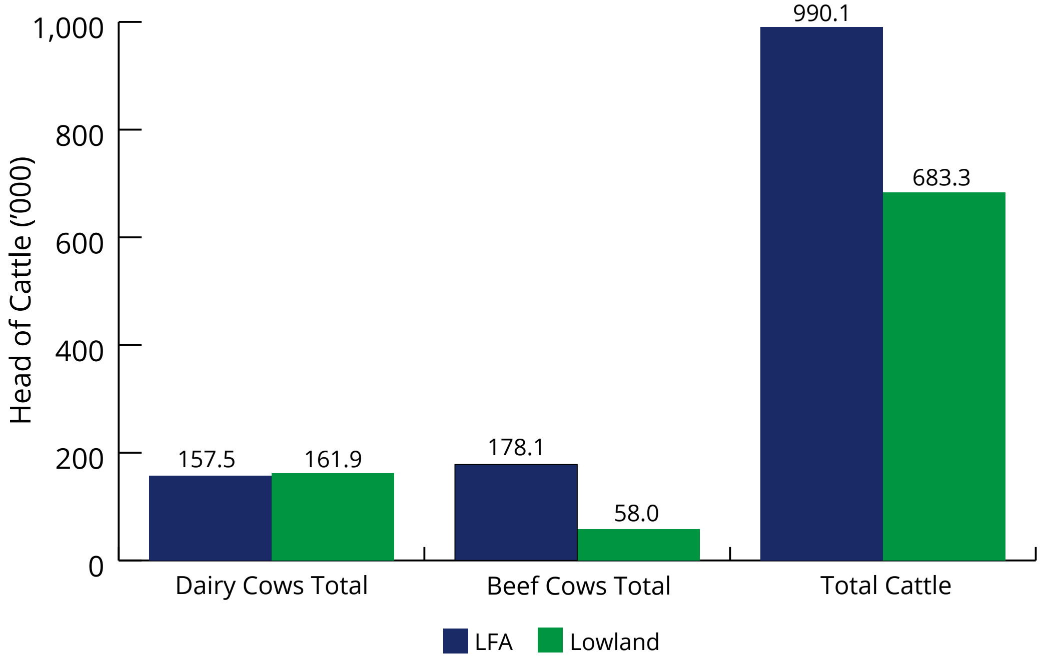
**Figure 3.5: Land use by Less Favoured Area (LFA) category of farm, Northern Ireland June 2023 (thousand hectares)**




See [Table 3.4 Areas of crops, grass, rough grazing and other land by Less Favoured Area, June 2023].

There are also significant differences in the patterns of livestock farming. Beef cows (178,129) predominate on **LFA farms**, where they are more important than dairy cows (157,468). On **lowland farms**, in contrast, there were 57,953 beef cows and 161,878 dairy cows in 2023.

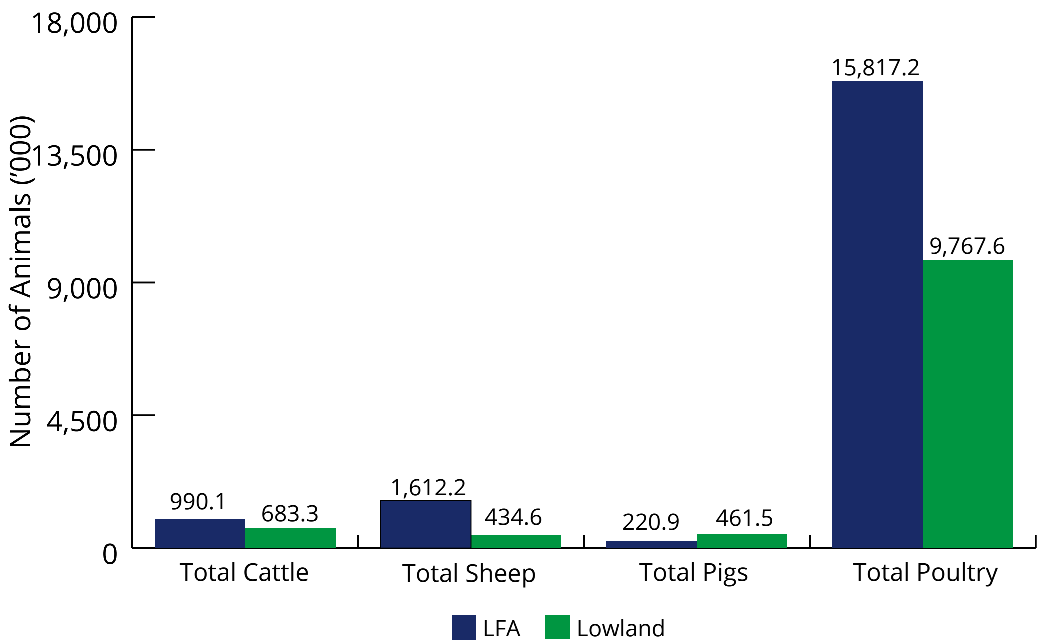
### Figure 3.6: Beef cows, dairy cows and total cattle by Less Favoured Area (LFA) category of farm (thousand head), Northern Ireland, June 2023




See Table 3.5 Livestock numbers by Less Favoured Area (LFA) category of farm, Northern Ireland, June 2023.

**LFA farms** account for 32.4 and 61.8 per cent of the Northern Ireland's pigs and poultry, respectively (Table 3.5).

### Figure 3.7: Livestock by Less Favoured Area (LFA) category of farm (thousand head), Northern Ireland, June 2023




See Table 3.5 Livestock numbers by Less Favoured Area (LFA) category of farm, Northern Ireland, June 2023.

# 4. Farm Structure

## Summary

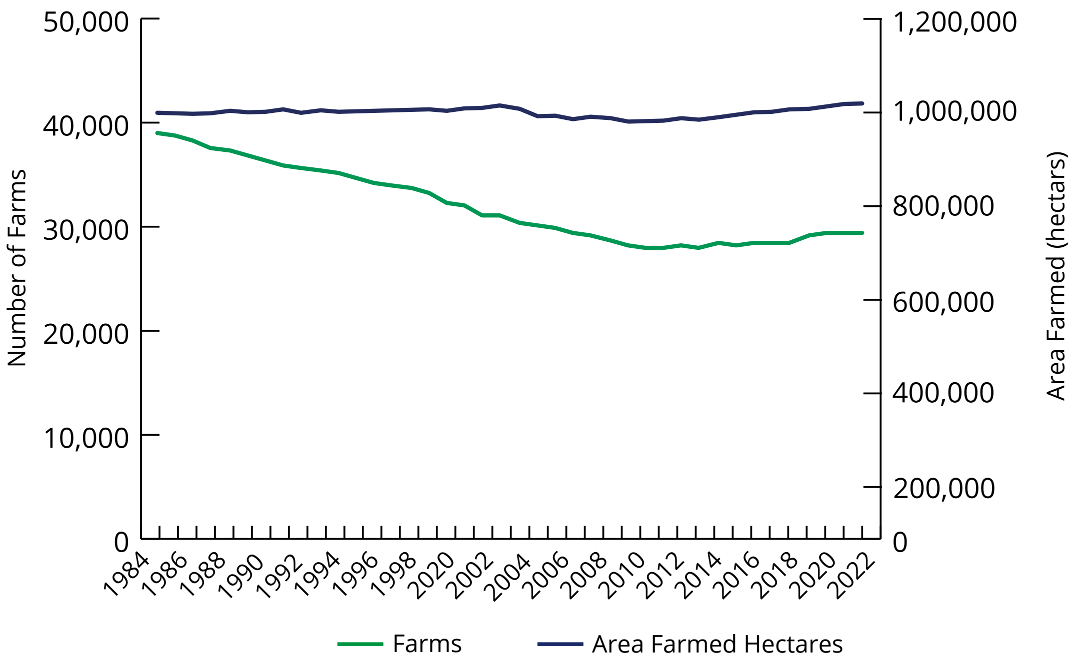

- Farm Structure: Over three quarters of farms in Northern Ireland are very small (20,603 in 2023). 78 per cent of farms in Northern Ireland have some cattle, 38 per cent have some sheep, 1 per cent have pigs and 4 per cent have some poultry.
- Farmers and workers: In June 2023 there were a total of 52,676 farm workers, of which 77 per cent were farmers, directors, partners or spouses.


Contact: Danielle Clarke, Tel. 028 9037 8559, E-mail: Danielle.clarke@daera-ni.gov.uk

## Farms

In June 2023 there were 26,131 farms in Northern Ireland with 1,042,318 hectares of land farmed.

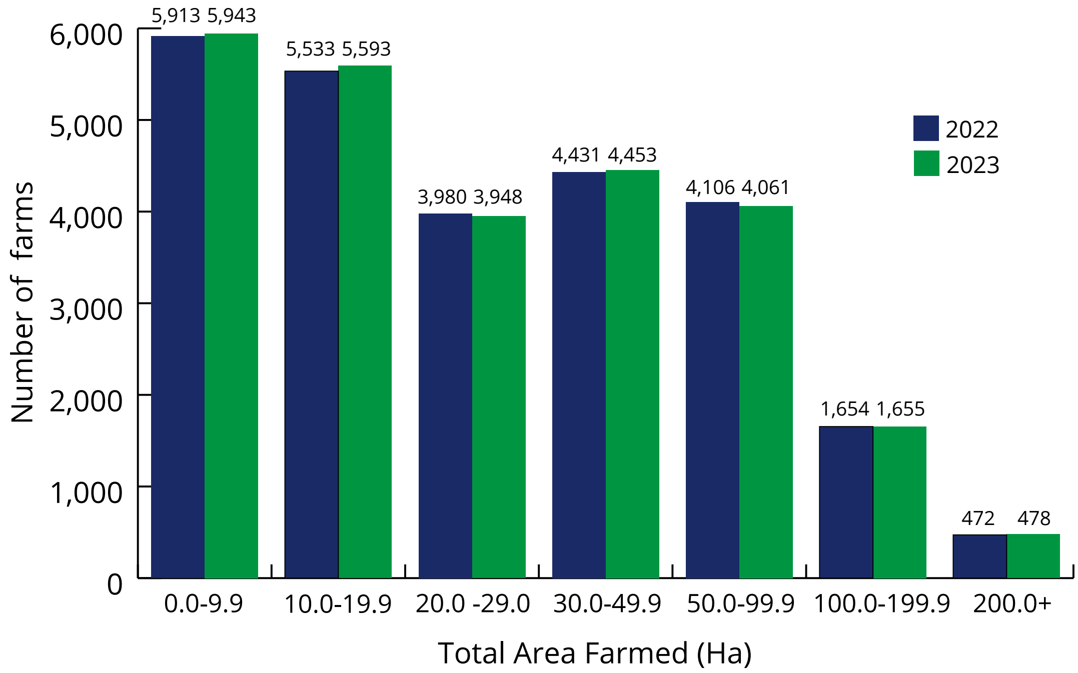
**Figure 4.1: Number of farms and area farmed, Northern Ireland 1984-2023**




See Table 3.2 Areas of crops, grass, rough grazing and other land, June 2018 - 2023.
See Table 4.1 Number and area of farms by area farmed1, Northern Ireland, June 2023.
See Table 4.2 Number of farms, average area and distribution of area by area farmed, Northern Ireland, 2018-2023.

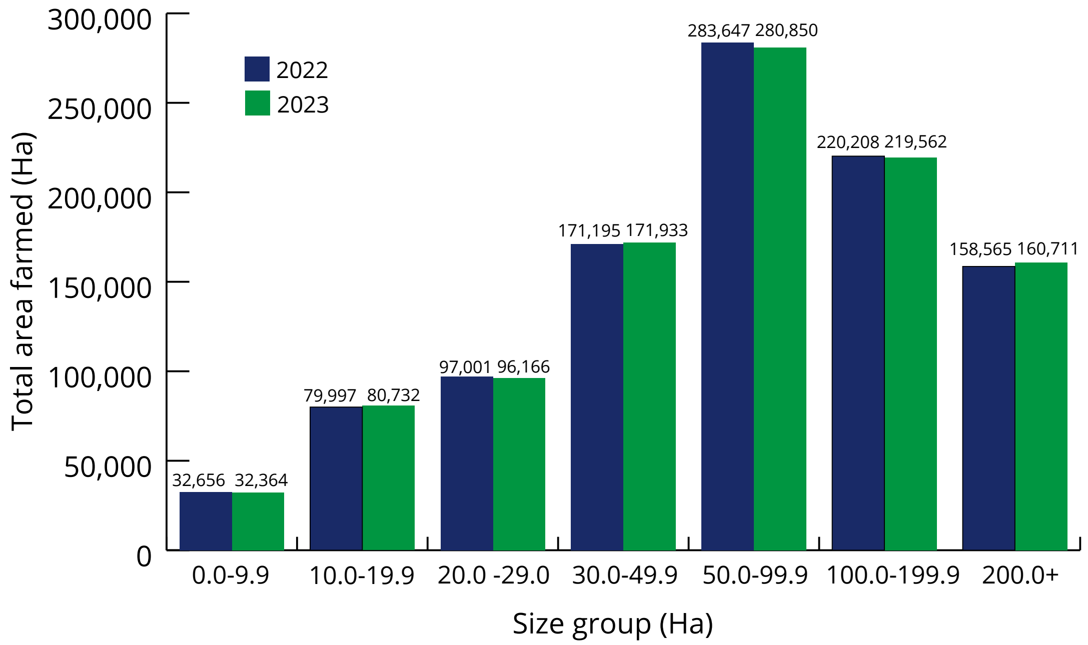
Around 26 per cent of farms have less than 10 hectares of crops and grass, while 1,543 farms (5.9 per cent) have 100 hectares or more. The latter occupy 27.7 per cent of the total area of crops and grass.

### Figure 4.2: Number of farms by size group of total area farmed (Hectares), Northern Ireland, June 2023




See Table 4.1 Number and area of farms by area farmed, Northern Ireland, June 2023.

### Figure 4.3: Total area farmed (Hectares) by size group, Northern Ireland, June 2023




See Table 4.1 Number and area of farms by area farmed, Northern Ireland, June 2023.

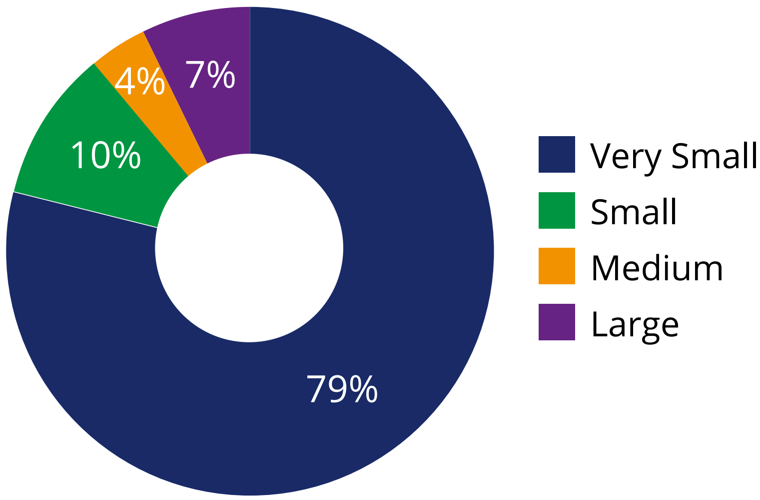
## Business size

Over three quarters of farm businesses in Northern Ireland (78.8 per cent), are classified as **very small**. In 2023, there were 20,603 farms in this category. These farms are unlikely to provide full time employment or an adequate income solely from farming activities.[2] They contribute 19.8 per cent of the industry's total standard output (SO) but account for 48.6 per cent of the farmed area. The main activities of these farms are cattle and sheep rearing. In 2023, 60.8 per cent of beef cows[3] and 52.2 per cent of total sheep were found on very small farms (Table 4.14). Over 35,000 persons are engaged in the work of these farms (Table 4.12).

There were 2,641 **small** farms, 10.1 percent of all farms in Northern Ireland. These farms make important contributions to all sectors, for example accounting for 23.1 per cent of poultry and 24.7 per cent of total sheep activities; they cover 18.7 per cent of the agricultural area and involve 14.8 per cent of the full-time agricultural labour force.

The 1,168 **medium** and 1,719 **large** farms (together representing 11.0 per cent of all farms) contribute 64.3 per cent of the total SO from approximately one third (32.7 per cent) of the land area. These farms dominate the dairy, pigs and poultry sectors with 86.0, 95.5 and 68.4 per cent shares of the livestock numbers, respectively.

### Figure 4.4: Farm Size, Northern Ireland, June 2023

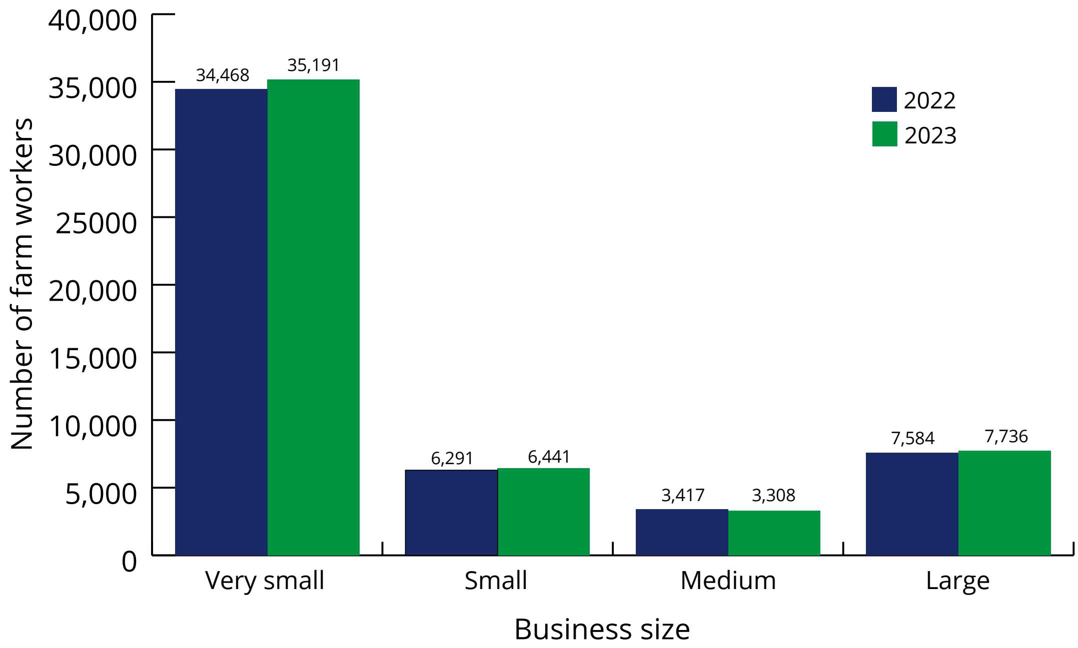



See Table 4.4 Number of farms by business size, Northern Ireland, 2018 - 2023.

**Farmers and workers:** The total number of farm workers increased by 1.8 per cent to 52,676 in 2023 from 51,760 in 2022. Figure 4.5 shows the breakdown of these total farm workers by farm business size. Whereas, figure 4.6 shows that the breakdown of these total farm workers between farmers, directors, partners or spouses (77.0 per cent) and all other farm workers (23.0 per cent) has remained relatively stable since 2005.

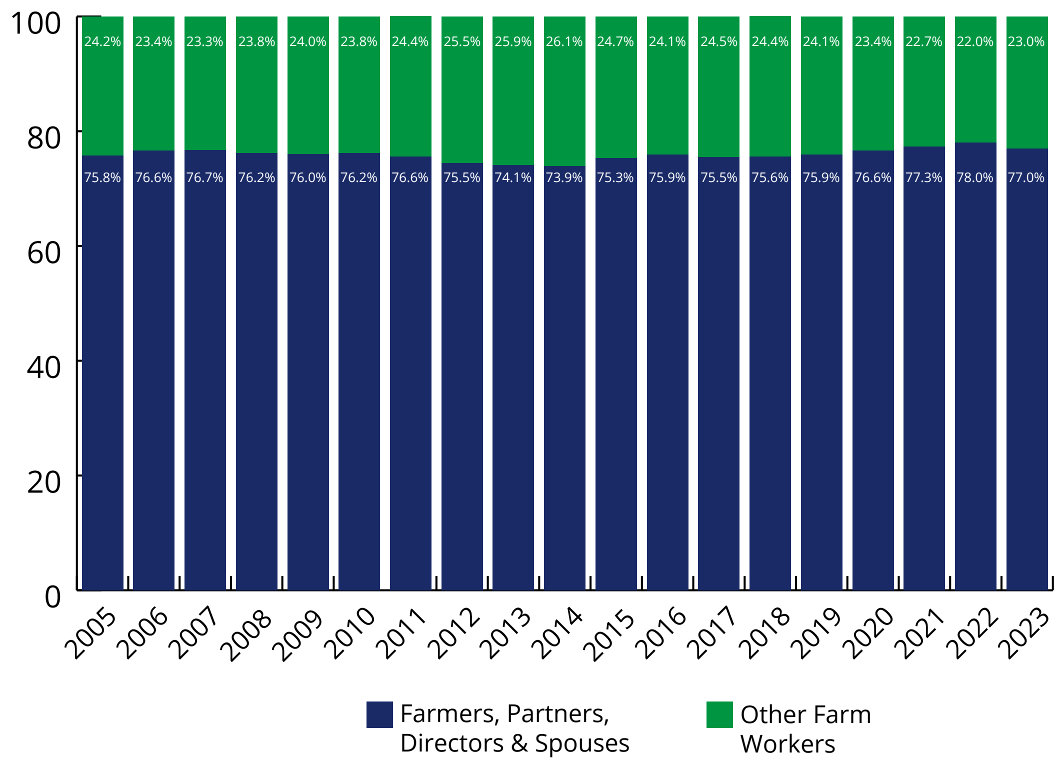
2 For further information on the persons living and working on farms of different sizes, see "Farmers and Farm Families in Northern Ireland", DAERA 2002.
3 Figures for cattle are derived from the cattle tracing system (APHIS, NIFAIS).

**Figure 4.5: Distribution of the farm labour force by business size, Northern Ireland, 2022-2023**




See Table 4.12 Distribution of the farm labour force by business size, Northern Ireland, June 2023.

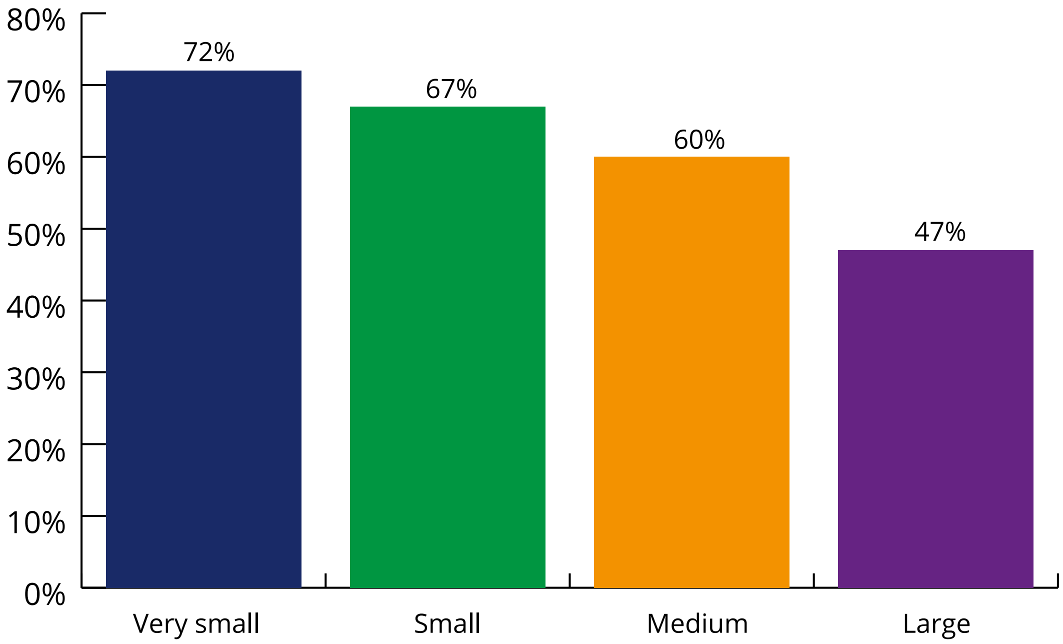
**Figure 4.6: Percentage of farm workers by type, Northern Ireland, 2005-2023**




See Table 4.12 Distribution of the farm labour force by business size, Northern Ireland, June 2023.

**Less Favoured Areas:** Seventy-two per cent of **very small** and 66.6 per cent of **small** farms are mainly in Less Favourable Areas whereas, for **medium** and **large** farms, the proportions are 59.9 and 47.2 per cent, respectively.

**Figure 4.7: Percentage of farms in LFA by farm size, Northern Ireland, June 2023**

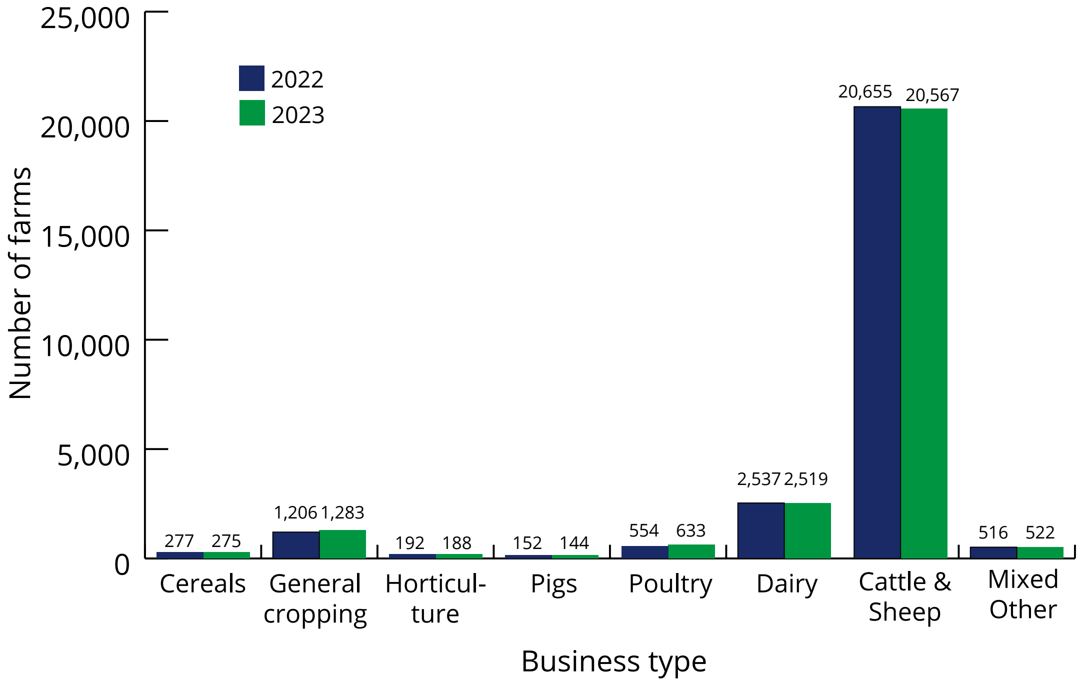



See Table 4.5 Distribution of the farm labour force by business size, Northern Ireland, June 2023.

## Farm type

Over 88 per cent of Northern Ireland farms derive two-thirds or more of their total standard output (SO) from grazing livestock, the predominant activity is cattle and sheep, including 9.6 per cent classified as **dairy** farms and 78.7 per cent as **cattle and sheep**. Relatively few farms depend predominantly on cropping with 275 (1.1 per cent) classified as **cereal** farms, 1,283 (4.9 per cent) as **general cropping** and 188 (0.7 per cent) as **horticulture**. Specialist **pigs and poultry** farms together (777) account for 3.0 per cent, while **mixed and other farms** (522) make up 2.0 per cent of the total. This remains relatively consistent with the results since 2020.

**Figure 4.8: Number of farms by business type, Northern Ireland June, 2022 - 2023**

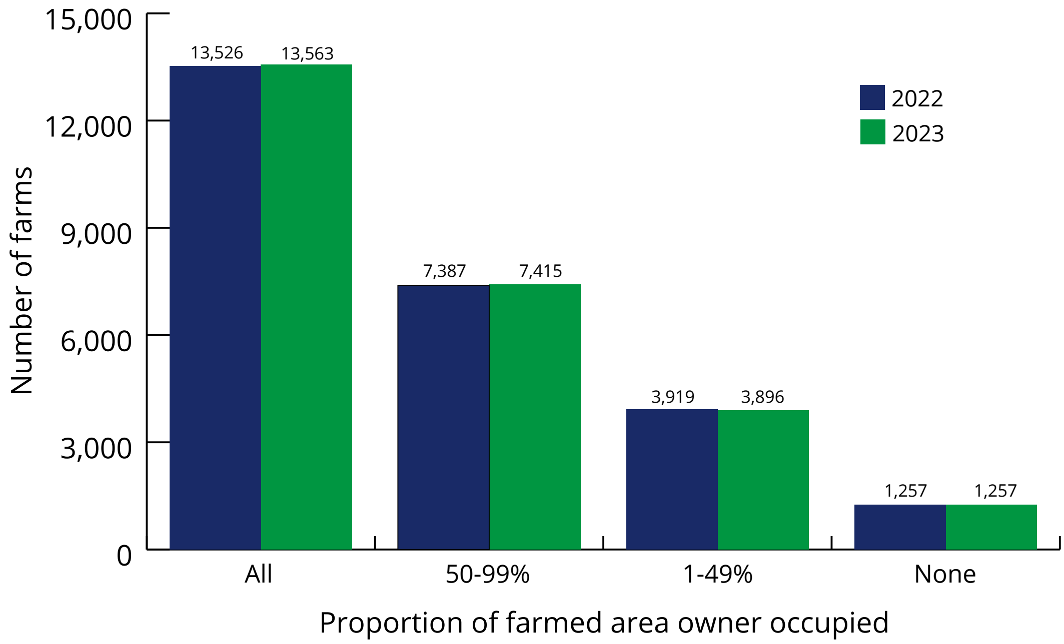



See Table 4.7 Number of farms by business type, Northern Ireland June 2018 - 2023.

## Farm tenure

Almost all farms in Northern Ireland have owned land and just under half include at least some rented land. Within the total farms, only 4.8 per cent were entirely rented or leased, 43.3 per cent had a mixture of owned and rented land and the remaining 51.9 per cent were entirely owner-occupied.

**Figure 4.9: Number of farms by proportion of area owner occupied, Northern Ireland, June 2022 and 2023**



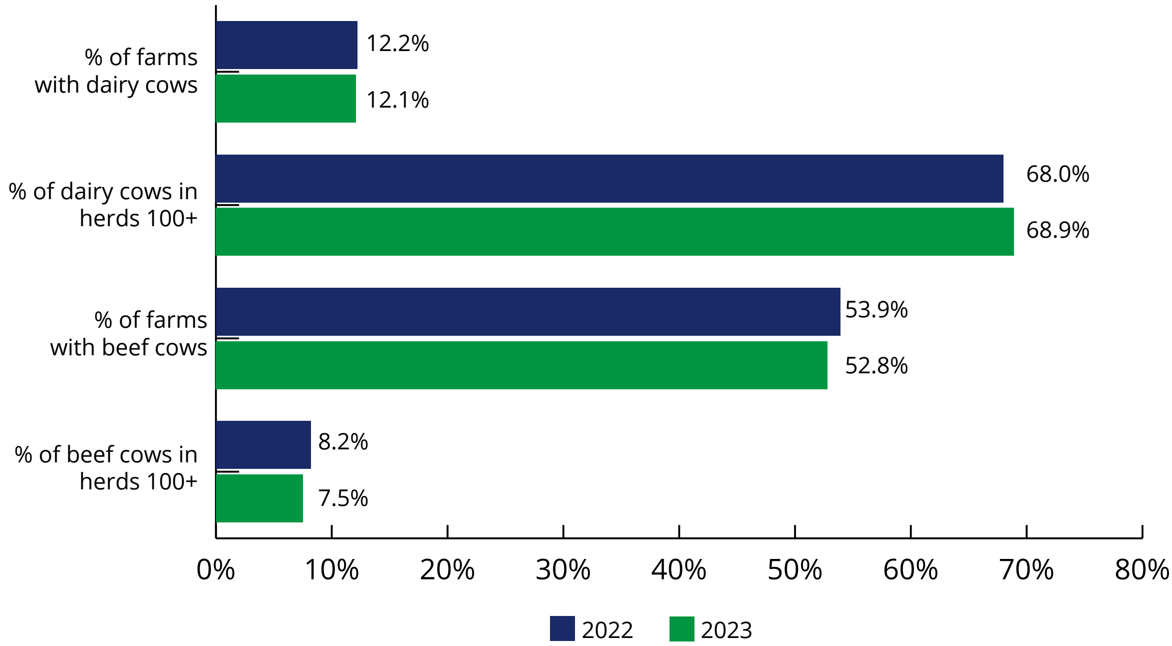

See Table 4.9 Number of farms by business size and proportion of area owner occupied, Northern Ireland June 2023.

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 2023, 3,150 farms (12.1 per cent) had dairy cows and 13,810 (52.8 per cent) had beef cows (Table 4.15). Almost 69 per cent of dairy cows are in herds of 100 or more cows, compared with 7.5 per cent of beef cows.

### Figure 4.10: Percentage of farms with dairy and beef cows and percentage of dairy and beef cows in herds of over 100, Northern Ireland, June 2022 and 2023

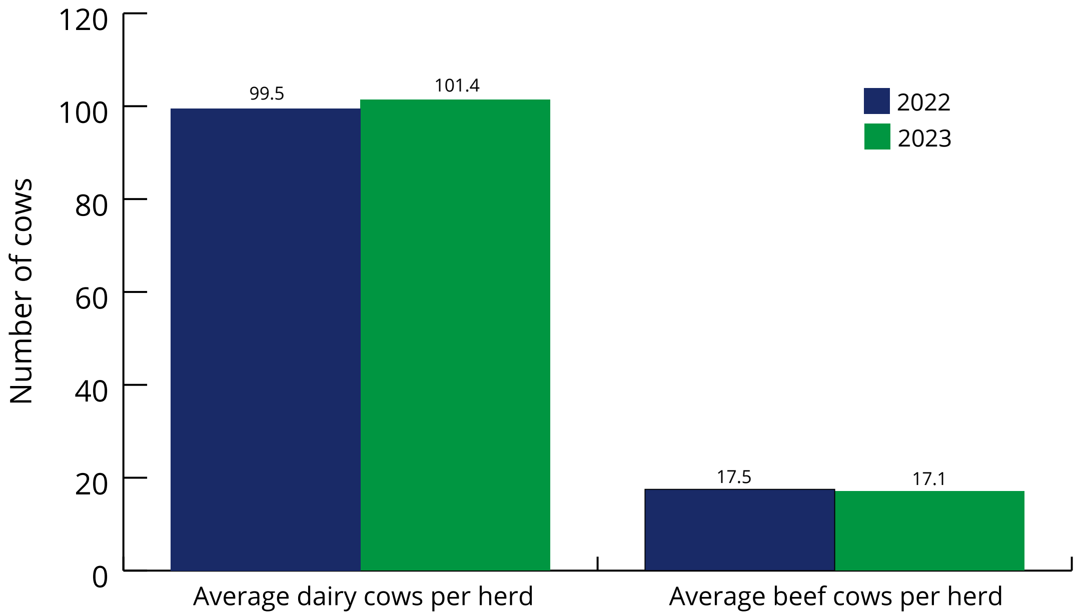



See Table 4.14 Distribution of numbers of livestock, hectares of crops, full-time labour and output by business size, Northern Ireland, June 2023.

See Table 4.15 Distribution of (a) dairy cows and (b) beef cows by herd size, Northern Ireland, June 2023.

The average number of dairy cows per herd, 101.4, was slightly more than in 2022 (99.5). It compares with an average herd size for beef breeding herds of 17.1 cows in 2023.

**Figure 4.11: Average number of cows of dairy cow and beef cow herds, Northern Ireland, June 2022 and 2023**

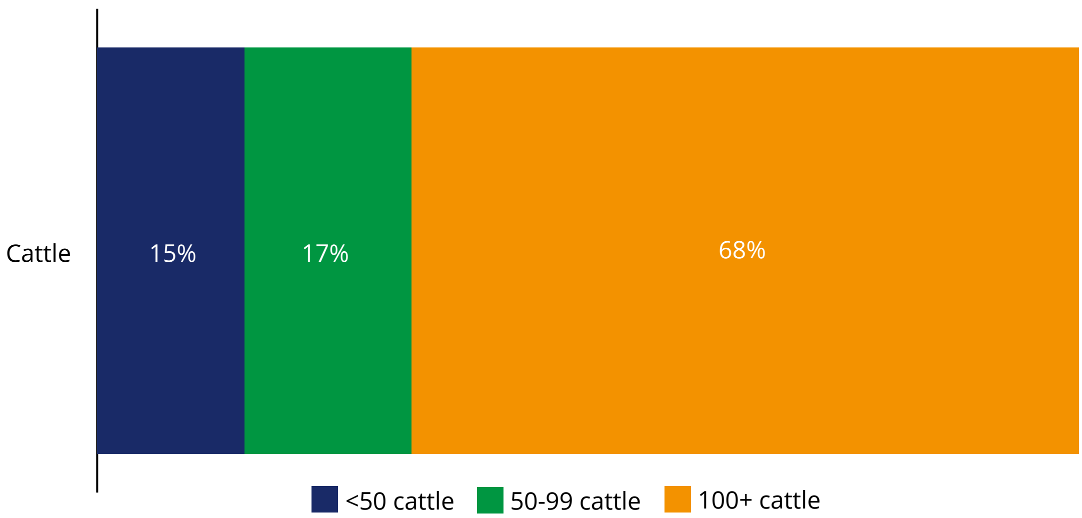



See [Table 4.15 Distribution of (a) dairy cows and (b) beef cows by herd size, Northern Ireland, June 2023].

See [Table 4.16 Distribution of total cattle by herd size, Northern Ireland, June 2023].

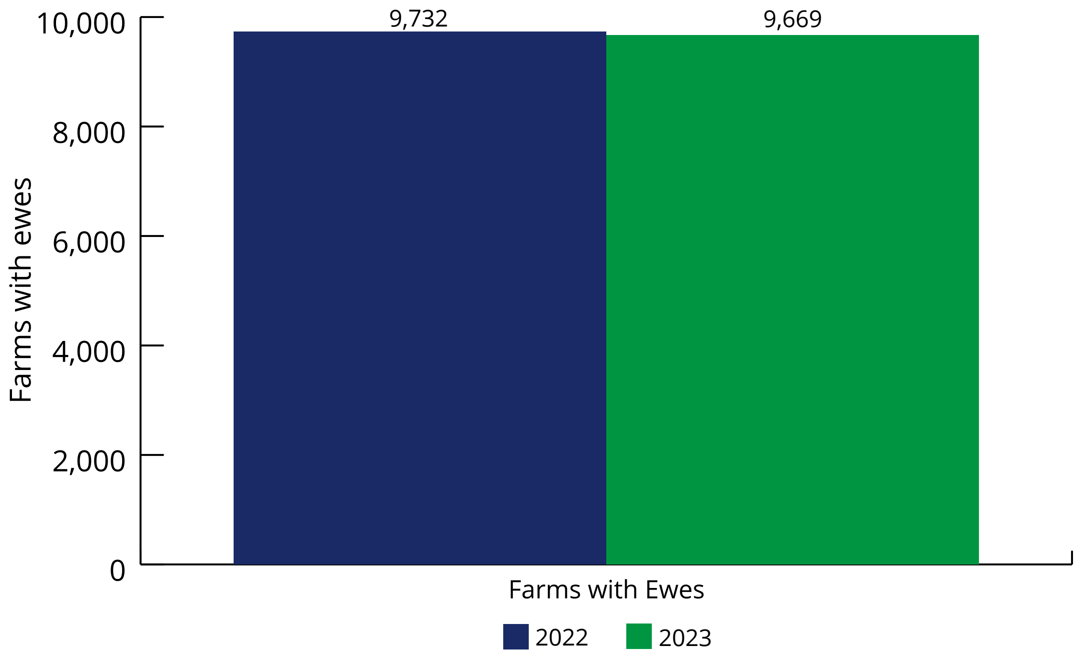
Over two thirds of cattle are in herds of 100 or more.

**Figure 4.12: Distribution of total cattle by herd size, Northern Ireland, June 2023**

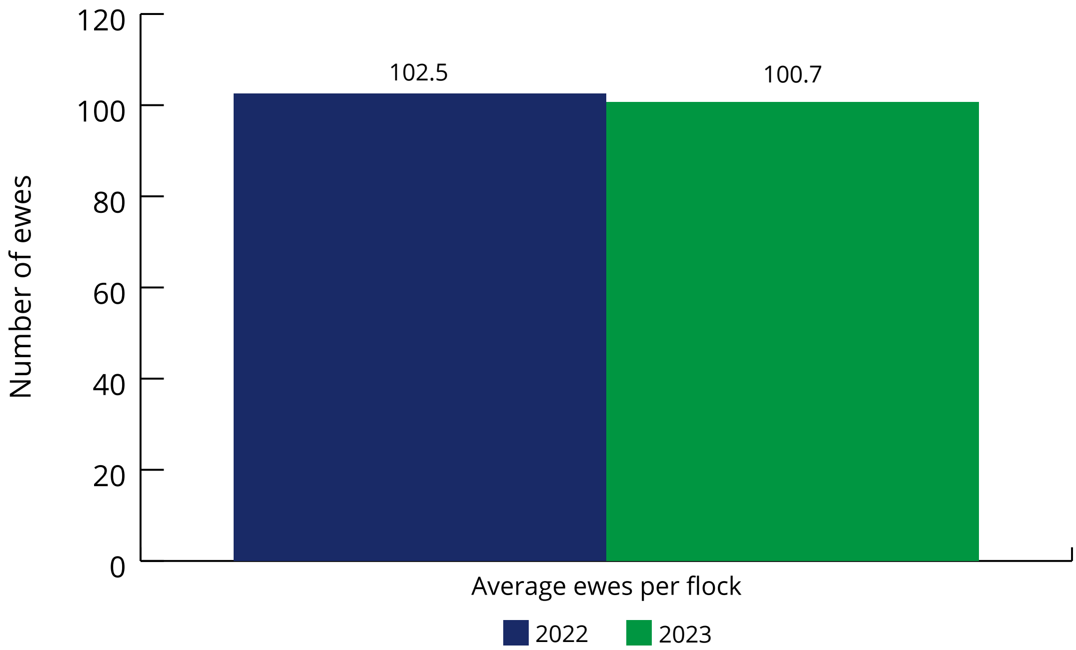



In 2023, 9,669 farms had breeding sheep, with an average of 101 ewes per flock.

### Figure 4.13: Number of farms with ewes, Northern Ireland June 2022 and 2023



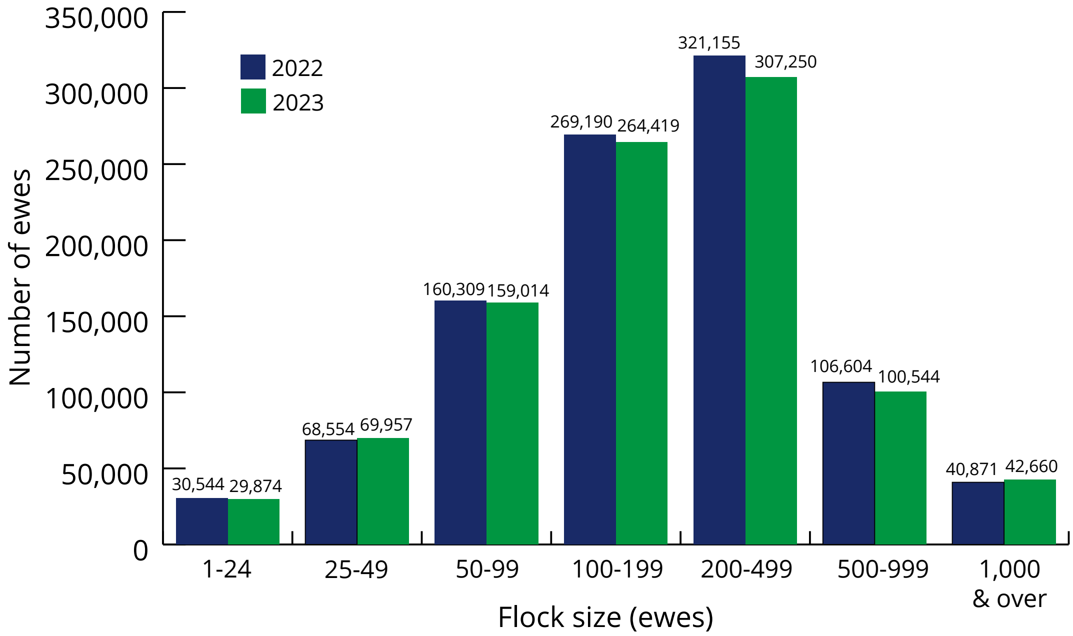

### Figure 4.14: Average number of ewes per flock, Northern Ireland, June 2022 and 2023




See Table 4.17 Distribution of (a) ewes and (b) total sheep by flock size, Northern Ireland, June 2023.

There were relatively few large flocks in Northern Ireland, with only 30 farms having a flock size of 1,000 ewes or more.

**Figure 4.15: Number of ewes by flock size, Northern Ireland, June 2022 and 2023**

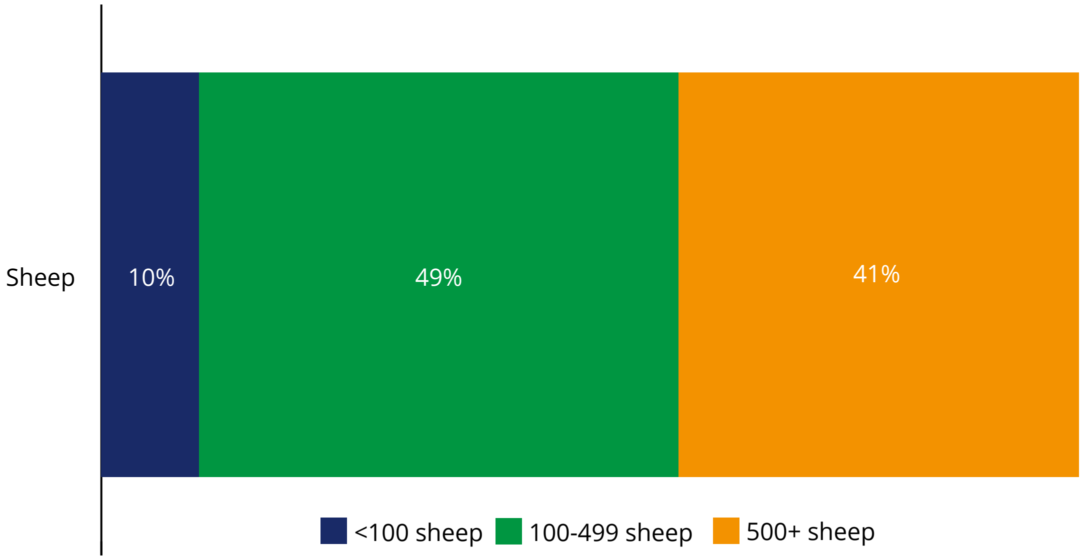



See Table 4.17 Distribution of (a) ewes and (b) total sheep by flock size, Northern Ireland, June 2023.

In June 2023, the total number of sheep decreased by 2.6 per cent to just over 2 million compared to 2022. There was a 2.4 per cent decrease in the number of breeding ewes compared with 2022 with numbers falling to 973,718.

Farms with more than 500 sheep on 1st June 2023 account for 40.6 per cent of the total sheep population.

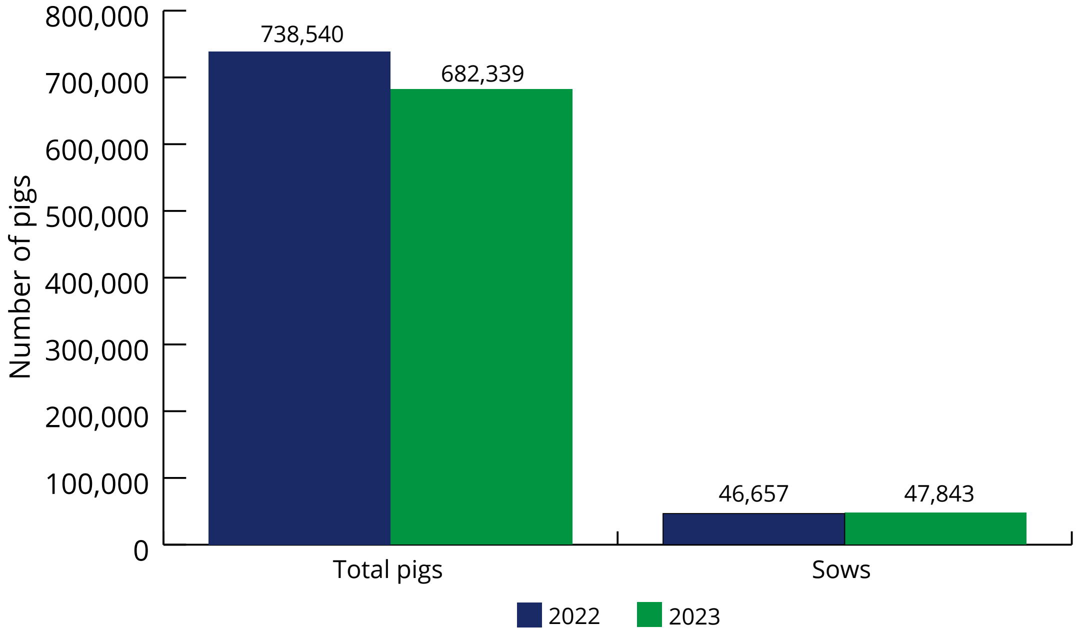
**Figure 4.16: Distribution of sheep on farm by flock size, Northern Ireland, 2023**




See Table 4.17 Distribution of (a) ewes and (b) total sheep by flock size, Northern Ireland, June 2023.

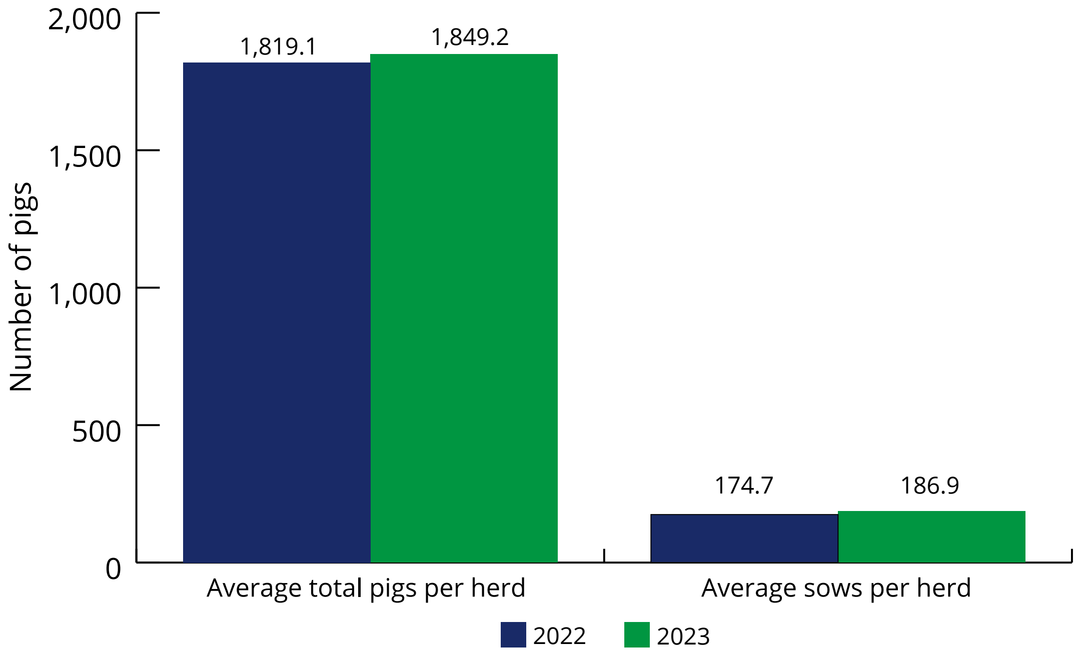
In 2023 there were 369 commercial pig herds operational in June. Most of the pig herds (256 in 2023) had sows, averaging 187 sows per herd.

**Figure 4.17: Number of farms with pigs and breeding sows, Northern Ireland, June 2022 and 2023**




See Table 4.18 Distribution of breeding sows by herd size, Northern Ireland, June 2023 & Table 4.19 Distribution of (a) Finishers/Weaners and (b) total pigs by herd size, Northern Ireland, June 2023.

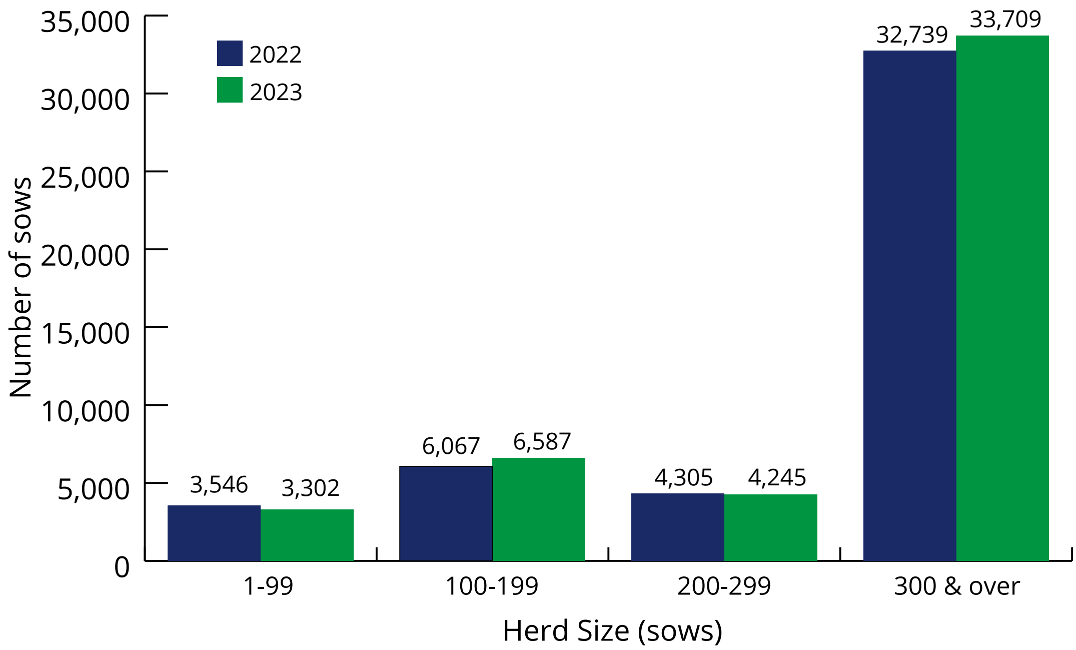
**Figure 4.18: Average number of total pigs and breeding sows per farm, Northern Ireland, June 2022 and 2023**




See Table 4.18 Distribution of breeding sows by herd size, Northern Ireland, June 2023 & Table 4.19 Distribution of (a) Finishers/Weaners and (b) total pigs by herd size, Northern Ireland, June 2023.

Ninety-three per cent of sows were found on farms with 100 or more sows - although these farms make up only 35.9 per cent of all farms with sows.

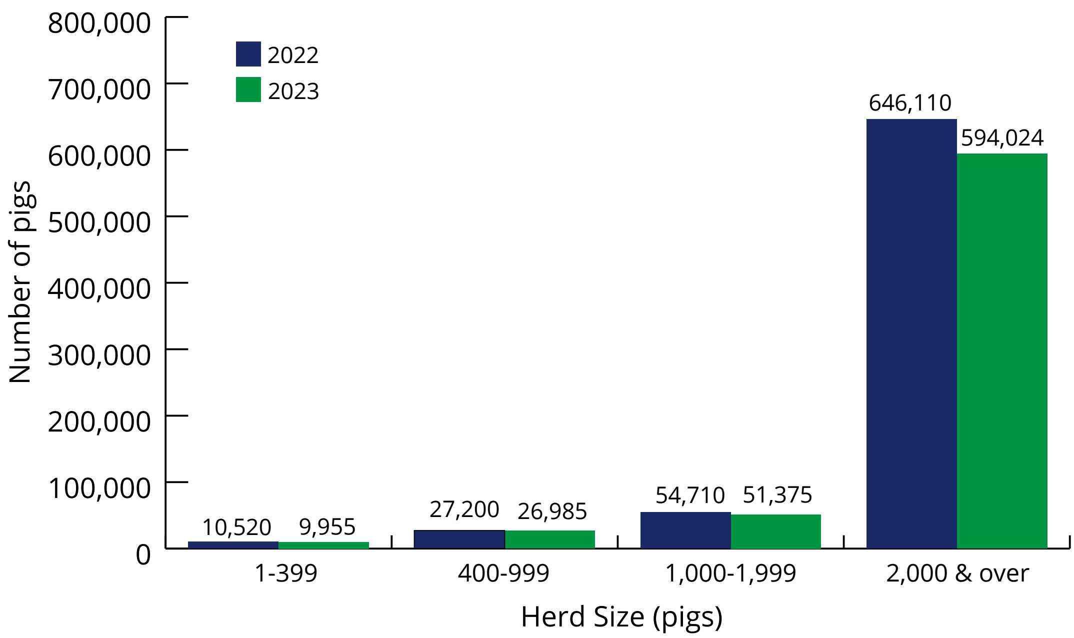
**Figure 4.19: Number of sows by herd size, Northern Ireland, June 2022 and 2023**




See Table 4.18 Distribution of breeding sows by herd size, Northern Ireland, June 2023.

Similarly, of total pigs, the largest units (>1000pigs) accounting for 25.7 per cent of total herds hold almost 95 per cent of total pigs.

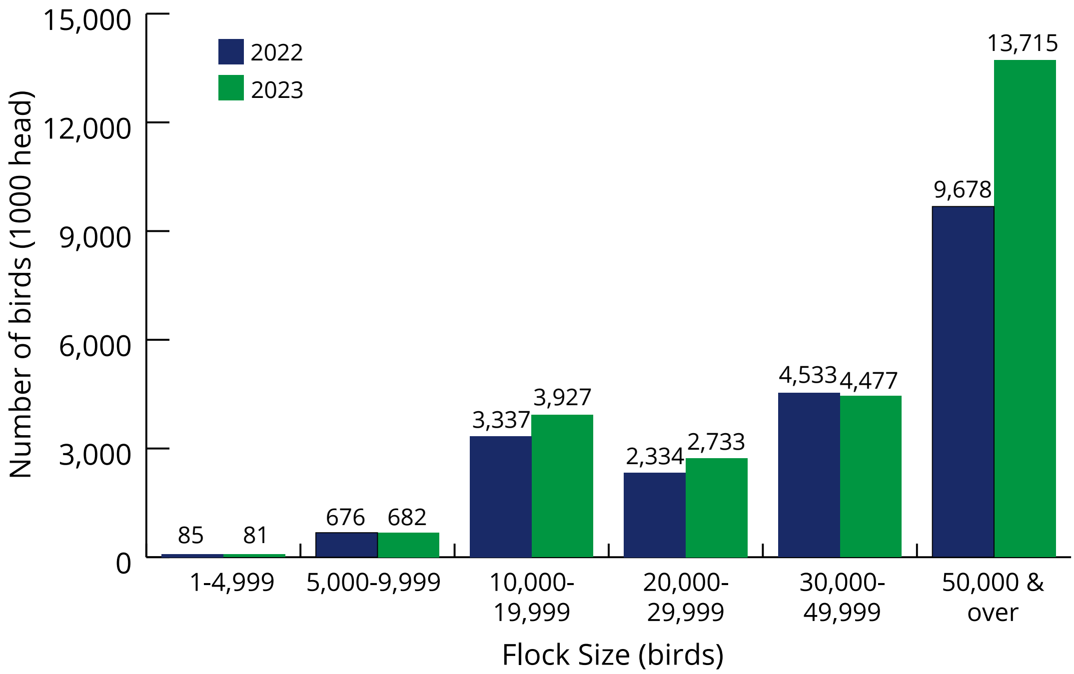
**Figure 4.20: Number of pigs by herd size, Northern Ireland, June 2022 and 2023**




See Table 4.19 Distribution of (a) Finishers/Weaners and (b) total pigs by herd size, Northern Ireland, June 2023.

Of the 1,063 business with poultry 67.7 per cent had flocks over 5,000 birds accounting for 99.7 per cent of total poultry. Twenty-five per cent of these businesses (261) farmed over thirty thousand birds with these farms accounting for 71.0 per cent of birds.

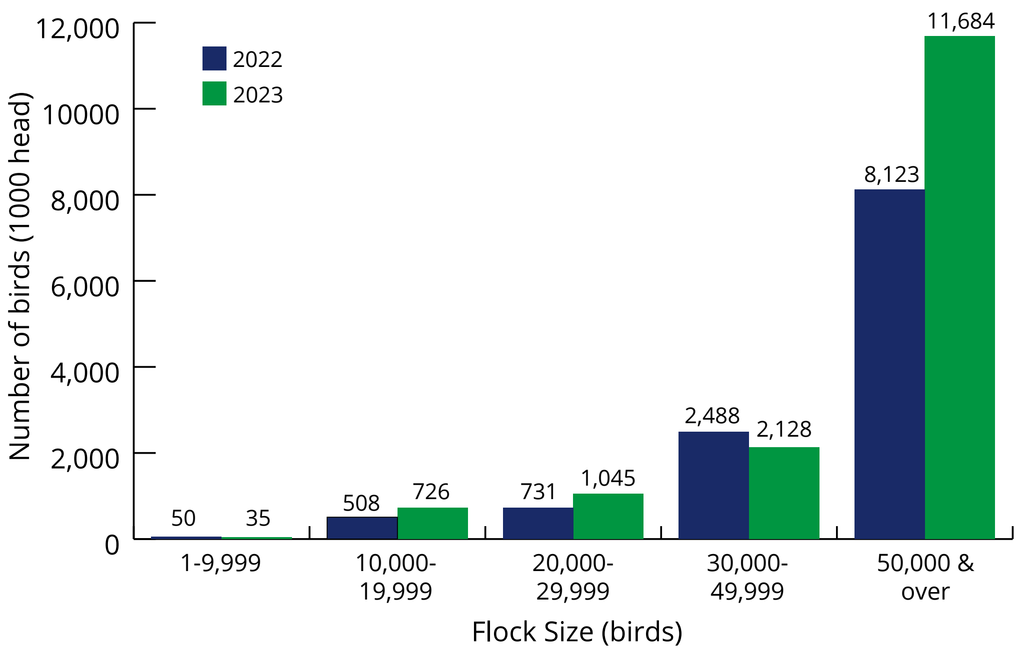
**Figure 4.21: Number of poultry by flock size, Northern Ireland, June 2022 and 2023 (1000 head)**




See [Table 4.21 Distribution of total poultry by flock size, Northern Ireland, June 2023].

On broiler units, the average flock size is a great deal larger, with 76.9 per cent of farms having twenty thousand birds or more on farm. Over 95.1 per cent of broilers are found on these farms.

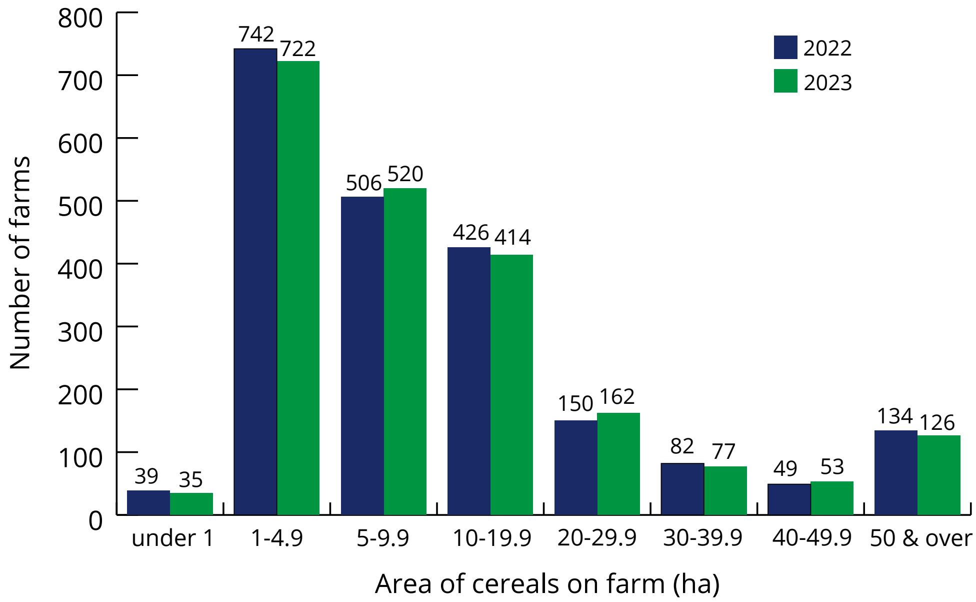
**Figure 4.22: Number of broilers by flock size, Northern Ireland, June 2022 and 2023 (1000 head)**




See [Table 4.20 Distribution of (a) laying hens and (b) broilers by flock size, Northern Ireland, June 2023].

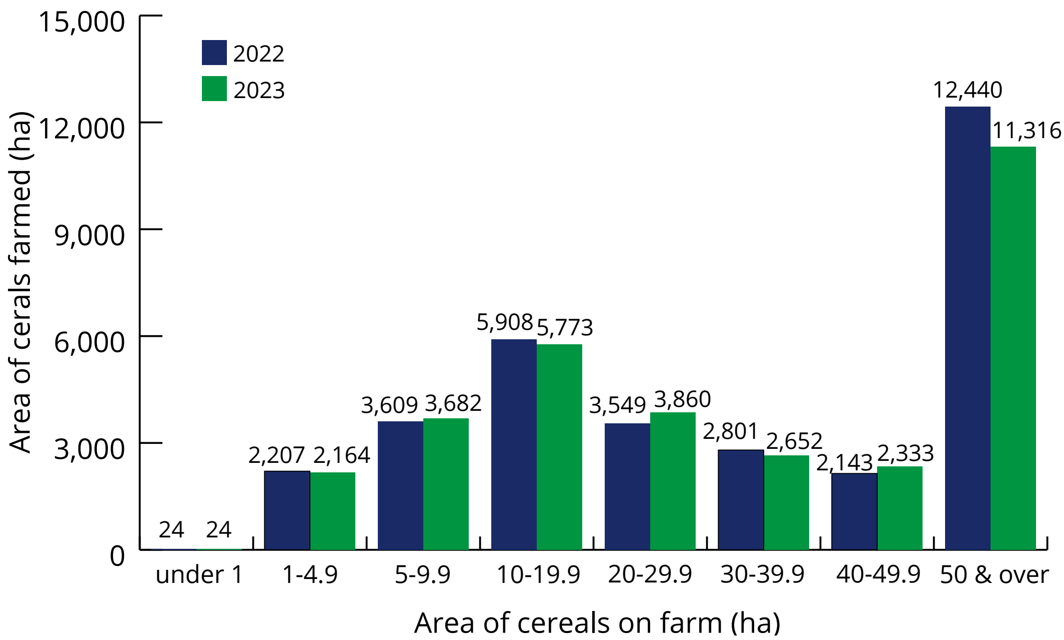
In 2023, cereals were grown on 2,109 farms, 8.1 per cent of all farms in Northern Ireland. The average area of a cereal enterprise was 15.1 hectares. Thirty-six per cent (757) of the farms with cereals had less than 5 hectares, while 126 farms grew 50 hectares or more and accounted for 35.6 per cent of the total cereal area grown.

### Figure 4.23: Number of farms with cereals by area of crop, Northern Ireland, June 2022 and 2023 (ha)




See Table 4.23 Distribution of total cereals by area of crop, Northern Ireland, June 2023.

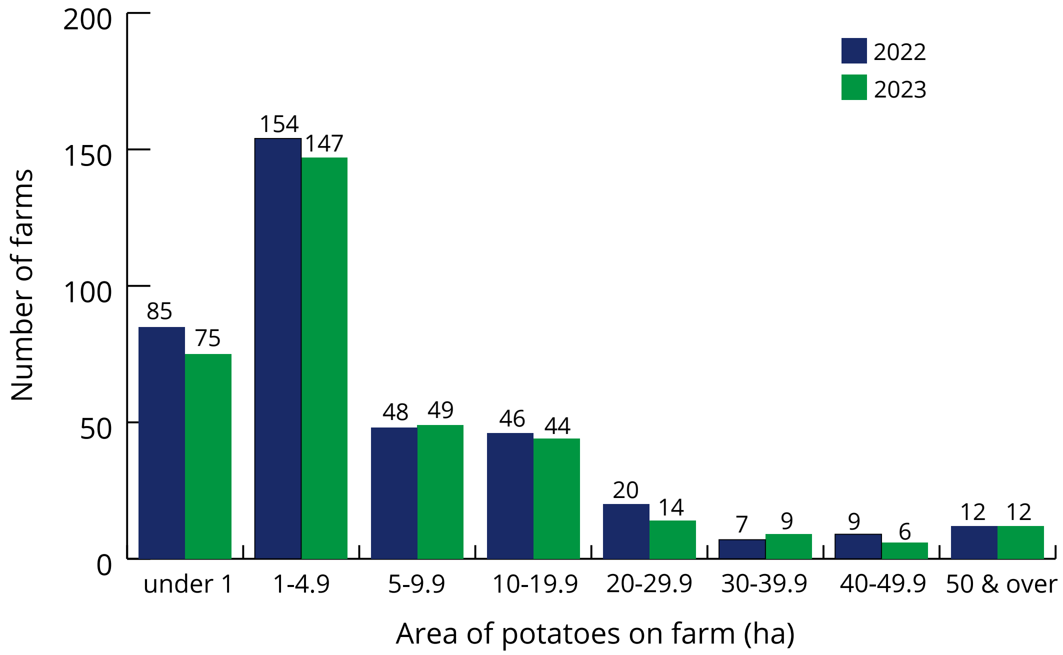
### Figure 4.24: Area of cereals grown by area of crop, Northern Ireland, June 2022 and 2023 (ha)




See Table 4.23 Distribution of total cereals by area of crop, Northern Ireland, June 2023.

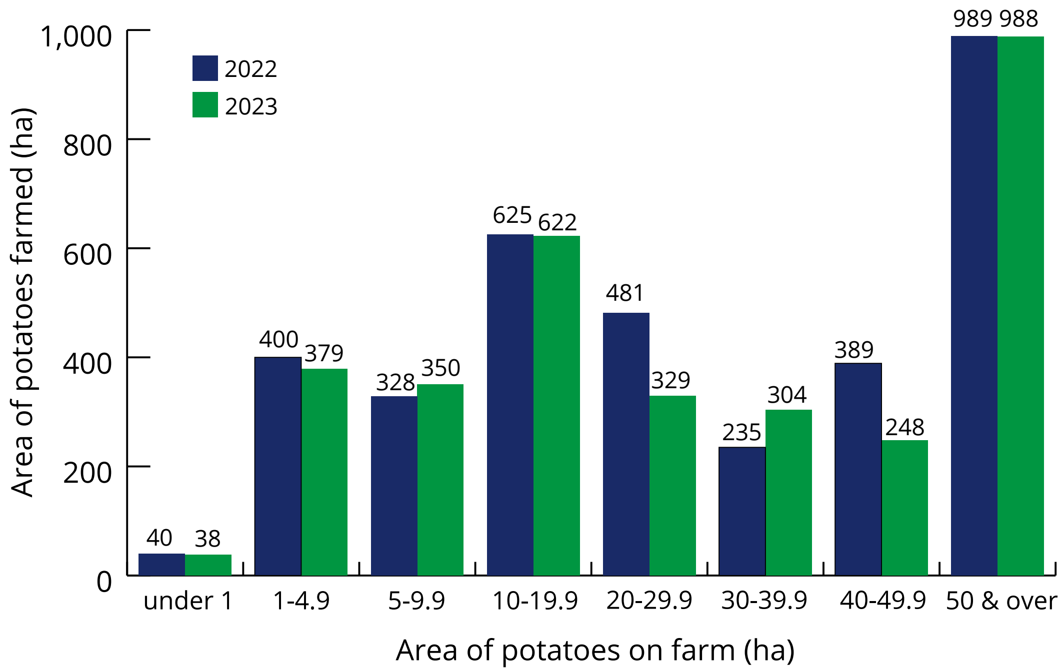
Some 356 farms, 1.4 per cent of total farms, grew potatoes in 2023. Of this number, 85 grew 10 hectares or more, with these farms accounting for more than three quarters of the total area of potatoes grown.

### Figure 4.25: Number of farms with potatoes by area of crop, Northern Ireland, June 2022 and 2023 (ha)




See Table 4.23 Distribution of potatoes by area of crop, Northern Ireland, June 2023.

### Figure 4.26: Area of potatoes grown by area of crop, Northern Ireland, June 2022 and 2023 (ha)




See Table 4.24 Distribution of potatoes by area of crop, Northern Ireland, June 2023.

# 5. Incomes at Farm Level

## Summary


- The average **Farm Business Income (FBI)** across all farm types increased from £43,252 in 2021/22 to £51,043 in 2022/23.
- **FBI** measured across all farm types is expected to decrease from an average £51,043 in 2022/23 to £27,345 in 2023/24, i.e. a decrease of £23,699 or 46% per farm.
- In 2022/23, the proportion of farms with a negative Farm Business Income was 11 per cent. This proportion was higher for Cattle and Sheep (LFA) farms at 19 per cent and lower for Dairy farms at 1 per cent.


Contact: Paul Keatley, Tel. 028 9052 4063, E-mail: Paul.Keatley@daera-ni.gov.uk

## Introduction

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 2022/23'.

**Farm Business Income (FBI)** represents 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. FBI was introduced in January 2008 as the headline measure of farm level incomes in the UK.

**Net Farm Income (NFI)** represents the return to the farmer and spouse for their manual and managerial labour and tenant-type capital invested in the farm business. Within its calculation, notional deductions are made for unpaid labour (excluding farmers and spouse) and owned land and buildings. Furthermore, no account is taken of any interest paid or earned.

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. Trends in Cash Income since 2018/19 are presented in Table 5.1.

## Income changes in 2022/23

At the individual farm type level, the results show that Farm Business Income decreased between 2021/22 and 2022/23 on Cereal, Cattle and Sheep (LFA), Cattle and Sheep (Lowland) and Mixed farms. In contrast, Dairy and Pig farm types showed an increase in average Farm Business Income.

Measured across all farm types, average Farm Business Income increased from £43,252 in 2021/22 to £51,043 in 2022/23, an increase of £7,792 per farm. Also measured across all farm types, average Net Farm Income increased from £36,087 in 2021/22 to £44,229 in 2022/23 (an increase of £8,142 per farm) and average Cash Income increased from £58,952 in 2021/22 to £69,527 in 2022/23 (an increase of £10,574 per farm).

**Headline figures on incomes by farm type, Northern Ireland, 2021/22 and 2022/23**

*£'000 per farm*

| Business type | CI | | FBI | | NFI | |
|---|---|---|---|---|---|---|
| | 2021/22 | 2022/23 | 2021/22 | 2022/23 | 2021/22 | 2022/23 |
| Cereals | 178.4 | 112.1 | 108.6 | 60.3 | 104.5 | 58.2 |
| Pigs | 110.4 | 109.5 | 44.4 | 74.7 | 74.7 | 112.7 |
| Dairy | 109.3 | 154.4 | 83.0 | 122.9 | 74.9 | 115.2 |
| Cattle and Sheep (LFA) | 31.0 | 27.9 | 22.4 | 18.1 | 15.6 | 11.2 |
| Cattle and Sheep (Lowland) | 40.0 | 35.3 | 28.8 | 21.1 | 20.3 | 12.8 |
| Mixed | 96.9 | 116.5 | 75.1 | 73.2 | 61.7 | 62.2 |
| All types | 59.0 | 69.5 | 43.3 | 51.0 | 36.1 | 44.2 |

See Table 5.3 for the full cash income by business size and farm type dataset.

See Table 5.4 for the full farm income by business size and farm type dataset.

See Table 5.5 for the full net farm income by business size and farm type dataset.

## Distribution of farms by income level

In 2022/23, the proportion of farms with a negative Farm Business Income was 11 per cent. This proportion was higher for Cattle and Sheep (LFA) farms at 19 per cent and lower for Dairy farms at 1 per cent.

Forty-four per cent of farms had an income less than £20,000 whereas 29 per cent had a Farm Business Income of more than £50,000. There was also variation between Dairy and Cattle and sheep (LFA) farm types in the individual income categories. For example, 81 per cent of Dairy farms were in the highest income category (>£50K) whereas for cattle and sheep (LFA) farms the proportion was 5 per cent.

Measured across all farm types, 24 per cent and 6 per cent of farms failed to make a positive Net Farm Income and Cash Income, respectively. The proportions were higher for Cattle and Sheep (LFA) farms at 33 per cent (Net Farm Income) and 13 per cent (Cash Income) respectively. Whereas only 1 per cent of Dairy farms had a negative Net Farm Income, and none had a negative Cash Income.

### Headline figures on the distribution of farms by income level, Northern Ireland 2022/23

*per cent*

| | Dairy | | | Cattle and sheep (LFA) | | | All types | | |
|---|---|---|---|---|---|---|---|---|---|
| **Income (£'s)** | **CI** | **NFI** | **FBI** | **CI** | **NFI** | **FBI** | **CI** | **NFI** | **FBI** |
| Less than 0 | 0 | 1 | 1 | 13 | 33 | 19 | 6 | 24 | 11 |
| 1 - 4,999 | 0 | 3 | 0 | 0 | 4 | 11 | 1 | 5 | 5 |
| 5,000 - 9,999 | 1 | 2 | 4 | 6 | 6 | 7 | 4 | 5 | 9 |
| 10,000 - 14,999 | 0 | 2 | 0 | 16 | 16 | 4 | 8 | 11 | 6 |
| 15,000 - 19,999 | 0 | 2 | 1 | 12 | 8 | 15 | 10 | 7 | 12 |
| 20,000 - 29,999 | 2 | 2 | 5 | 15 | 19 | 21 | 12 | 10 | 13 |
| 30,000 - 49,999 | 8 | 17 | 8 | 24 | 9 | 18 | 18 | 11 | 14 |
| > 50,000 | 89 | 73 | 81 | 15 | 4 | 5 | 40 | 27 | 29 |
| **Total** | **..** | **100** | **..** | **..** | **100** | **..** | **..** | **100** | **..** |
| Number of farms in sample | | 78 | | | 70 | | | 193 | |

See Table 5.2 for the dataset on the distribution of CI, NFI, and FBI by farm type dataset.

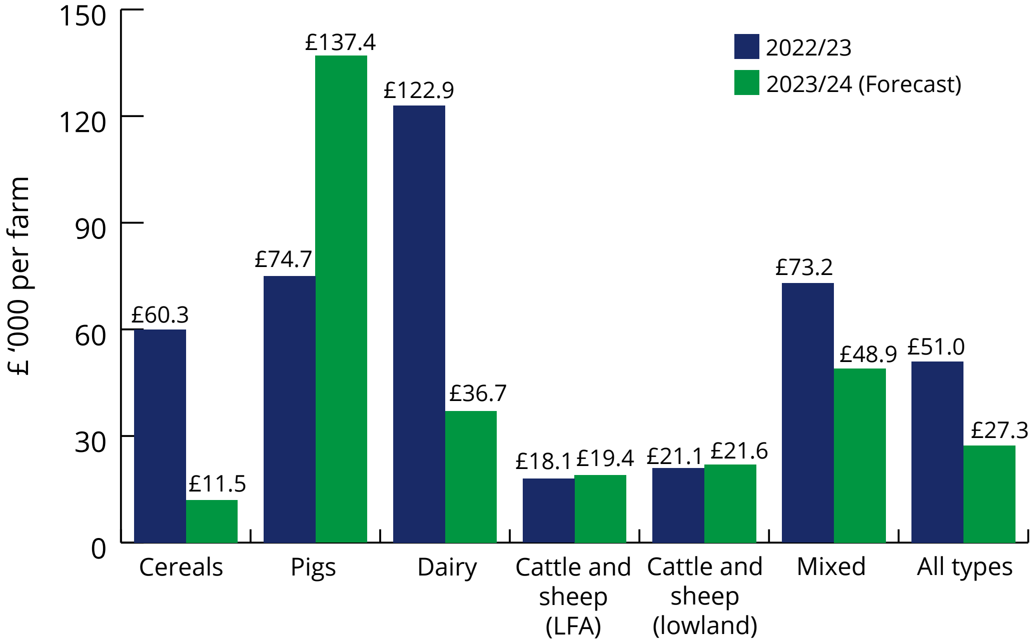
## Provisional estimates of incomes for 2023/24

Provisional estimates of incomes for farm businesses larger than 0.5 Standard Labour Requirements for the year ending mid-February 2024 show average Farm Business Income measured across all farm types decreasing from £51,043 in 2022/23 to £27,345 in 2023/24, i.e. a decrease of £23,699 or 46% per farm.

Farm Business Income is expected to increase (by varying amounts) for Cattle & Sheep (LFA), Cattle & Sheep (lowland) and Pig farm types between 2022/23 and 2023/24. For these farms, the upturn in their incomes is attributable to higher beef and pig prices in the 2023/24 year. Whereas, Farm Business Incomes for Cereals, Dairy and Mixed farm types are expected to fall by 81%, 70% and 33% respectively due to lower grain and milk prices in the 2023/24 year.

Average Cash Income measured across all farm types is estimated to decrease from £69,527 in 2022/23 to £47,451 in 2023/24, which is a decrease of £22,076 per farm. Whereas average Net Farm Income measured across all farm types is estimated to decrease from £44,229 in 2022/23 to £21,938 in 2023/24.

**Figure 5.1: Average Farm Business Income by farm type (£ per farm), Northern Ireland, 2022/23 and 2023/24**




## Assets, Liabilities, and Net Worth of Farms

The average total assets per farm measured across all farm types were £1,525,727 in 2022/23. Whereas average external liabilities per farm measured across all farm types were £44,832 in 2022/23, which is 2% higher compared to the previous year. When measured across all farm types the average external liabilities (i.e. mainly bank borrowings) per farm in 2022/23 were equivalent to 3% of total farm assets. Given these values for assets and liabilities the average net worth per farm measured across all farm types was £1,480,895 in 2022/23. When measured across all farm types, net worth expressed as a percentage of total assets was 97% in 2022/23.

**Headline figures on assets, liabilities, and net worth of farms,Northern Ireland, 2021/22 and 2022/2023**

*£'000 per farm*

| | Dairy | | Cattle and sheep (LFA) | | All types | |
|---|---|---|---|---|---|---|
| | 2021/22 | 2022/23 | 2021/22 | 2022/23 | 2021/22 | 2022/23 |
| Total fixed assets | 1,477.5 | 1,601.4 | 1207.1 | 1,248.5 | 1,350.1 | 1,412.7 |
| Total current assets | 116.8 | 136.9 | 71.5 | 77.3 | 103.3 | 113.0 |
| **Total assets** | **1,594.3** | **1,738.3** | **1,278.6** | **1,325.8** | **1,453.4** | **1,525.7** |
| Total long/medium term loans | 69.4 | 61.0 | 10.6 | 10.8 | 30.7 | 28.0 |
| Total short term loans | 26.5 | 34.6 | 8.2 | 9.0 | 13.1 | 16.8 |
| **Total external liabilities** | **95.9** | **95.6** | **18.8** | **19.8** | **43.9** | **44.8** |
| **Net worth** | **1,498.4** | **1,642.7** | **1,259.8** | **1,306.0** | **1,409.6** | **1,480.9** |

See Table 5.6 for the dataset on the average tenant's capital by farm type.
See Table 5.7 for the full dataset on the average closing valuations by farm type.

# 6.1. Northern Ireland Food and Drink Processing Sector

## Summary

- In 2021, the NI Food and Drinks Processing Sector employed 25,116 people, had a turnover of £6.0 billion, added £1.1 billion to the Northern Ireland economy and purchased £4.7 billion worth of goods and services for production.
- The sector also contributed 39 per cent to total manufacturing sales, 30 per cent to total manufacturing employment, 19 per cent to manufacturing GVA and accounted for just over 2 per cent of total NI GVA.

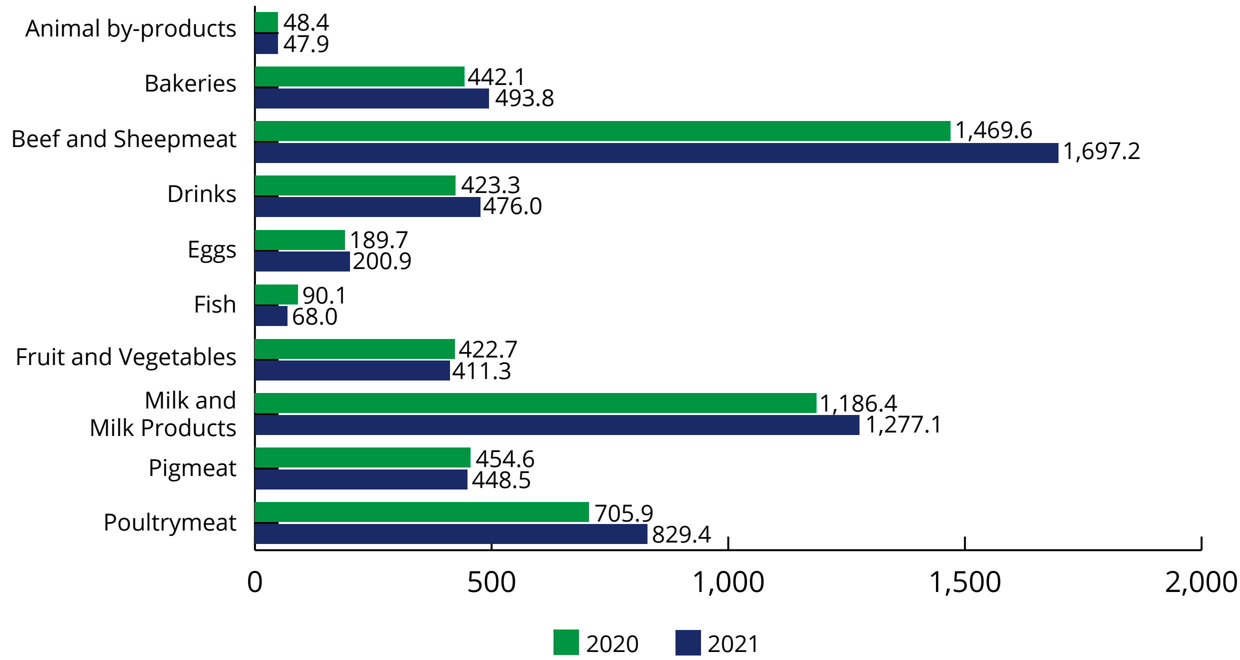
The publication Northern Ireland Food and Drinks Processing report is an annual publication providing estimates for key sector size variables and benchmarking variables.

For more in depth information, please read Northern Ireland Food and Drinks Processing Report 2021.

## Gross Turnover

Gross turnover in the Northern Ireland food and drinks processing sector increased from £5,433 million to £5,950 million between 2020 and 2021; an increase of 10 per cent. Six subsectors experienced increases in turnover over the period.

### Figure 6.1: Northern Ireland food and drinks processing subsector turnover, 2020-2021 (£ million)

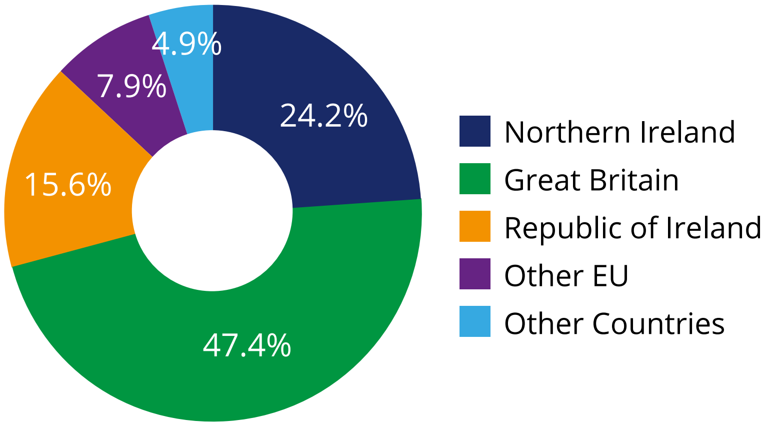



See Table 6.1 Gross turnover of the Northern Ireland food and drinks processing sector 2016-2021.

## Destination of Sales

Great Britain was the main destination of sales for the NI food and drinks processing sector in 2021 at 47 per cent of total sales. Northern Ireland is the second largest market at 24 per cent. Export sales represent 29 per cent of total sales.

**Figure 6.2: Destination of Northern Ireland food and drinks processing sector sales, 2021**

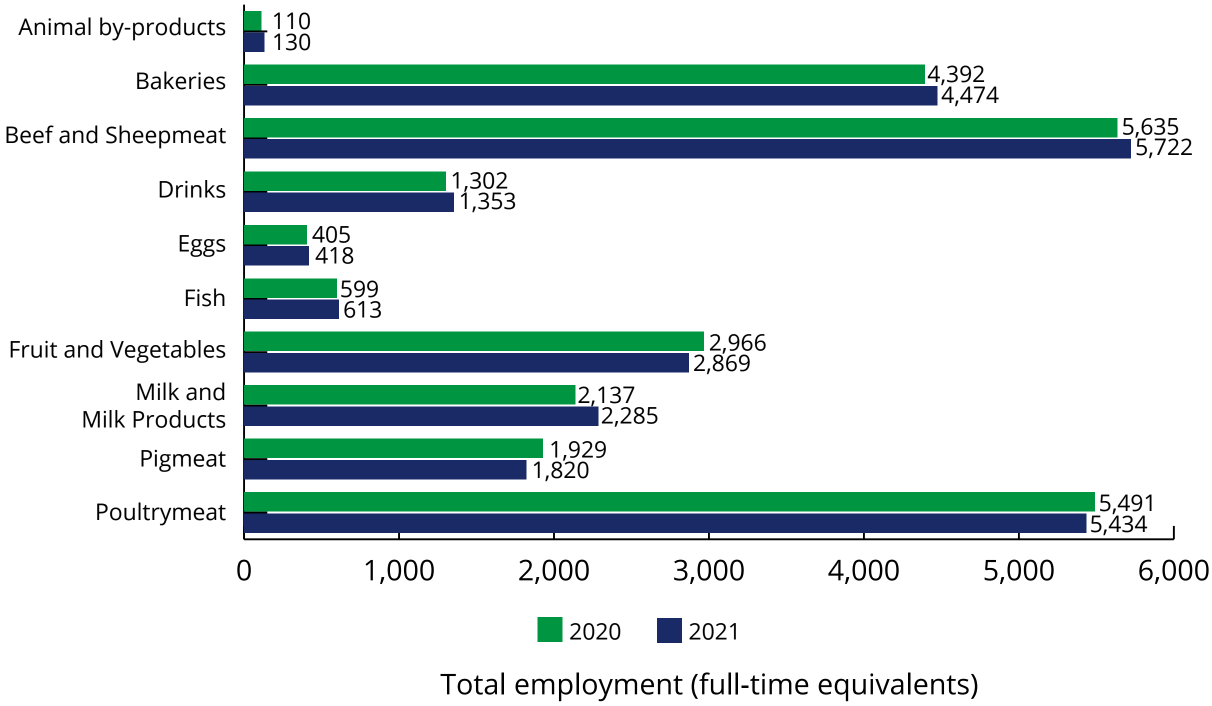



See Table 6.2 Destinations and values of NI food and drinks processing subsector sales, 2021.

## Employment

Employment in the sector is estimated to have to have increased from 24,965 full time equivalents in 2020 to 25,116 in 2021; an increase of 1 per cent. Seven subsectors experienced increases in employment over the period.

**Figure 6.3: Northern Ireland food and drinks processing subsector employment, 2020-2021**

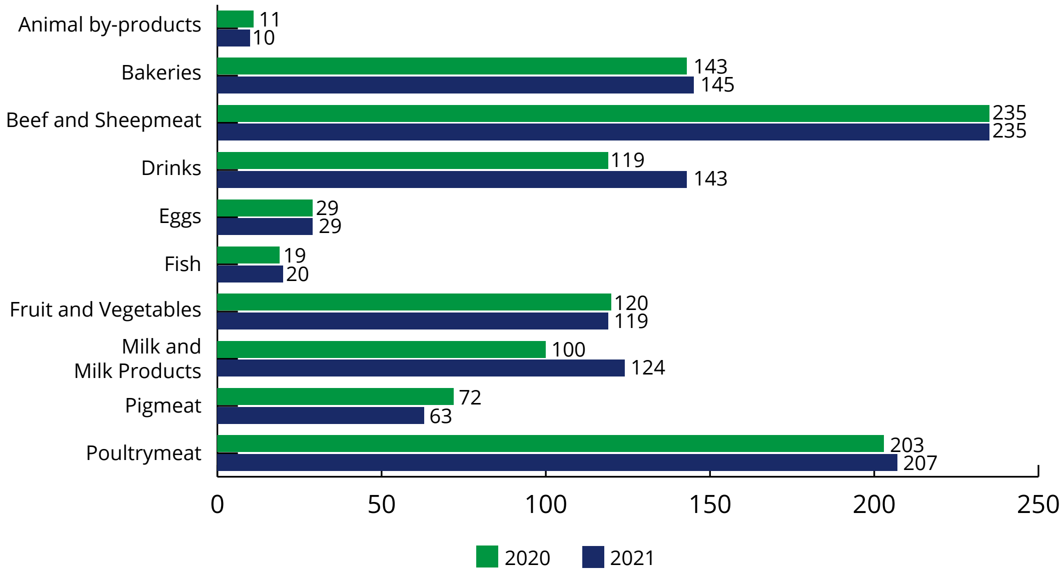



See Table 6.3 Estimated employment in the NI food and drinks processing sector 2016-2021.

## Value Added

Value added by the Northern Ireland food and drinks processing sector to the economy has increased from £1,052 million in 2020 to £1,096 million in 2021; an increase of 4 per cent. Five of the subsectors experienced an increase in value added over the period.

**Figure 6.4: Northern Ireland food and drinks processing subsector value added, 2020-2021 (£ million)**

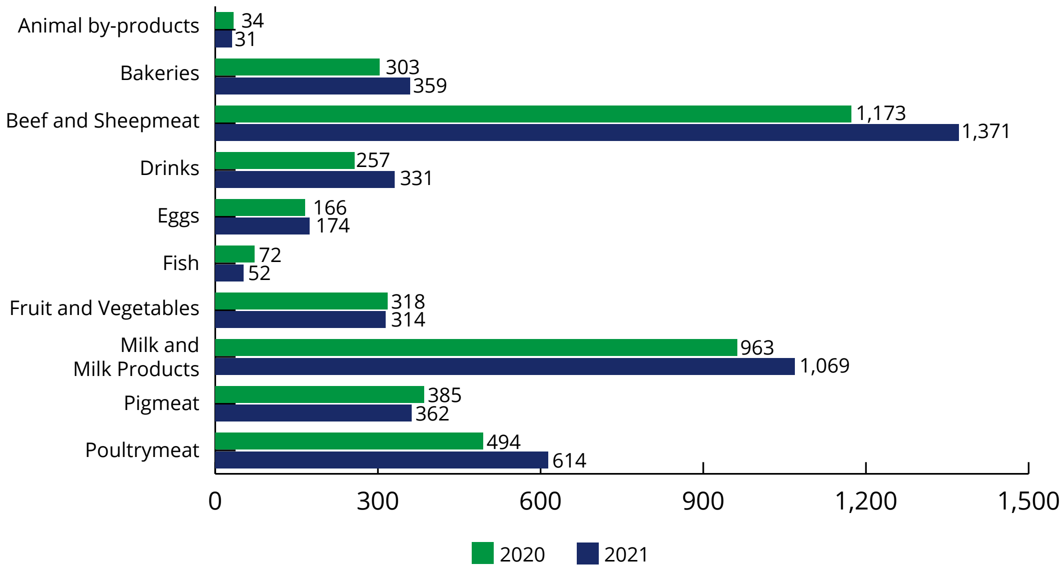



See [Table 6.4 Value Added by the Northern Ireland food and drinks processing sector 2016-2021].

## Purchases

Total purchases by the Northern Ireland food and drinks processing sector increased from £4,165 million in 2020 to £4,678 million in 2021; an increase of 12 per cent. Six subsectors experienced increases in purchase costs over the period.

**Figure 6.5: Northern Ireland food and drinks processing subsector purchases, 2020-2021 (£ million)**

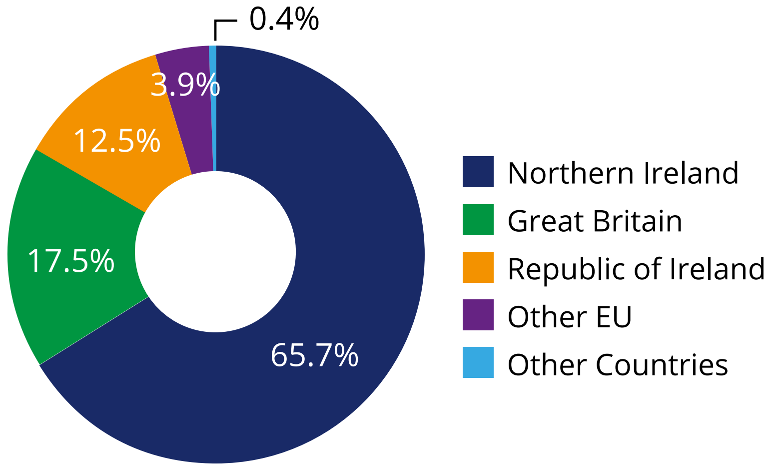



See [Table 6.5 Total Purchases of the Northern Ireland food and drinks processing sector 2016-2021].

## Purchases by Origin

Northern Ireland remains the largest market for purchases for the sector in 2021 at 66 per cent. Purchases from Great Britain and purchases from outside the United Kingdom are around the samesize at 17 per cent.

**Figure 6.6: Origin of Northern Ireland food and drinks processing sector purchases, 2021**




See Table 6.6 Origins and Values of NI Food and drinks processing sector purchases, 2021.

# 6.2. Other Agri-Food Trade and Employment Data

This section provides other Northern Ireland agri-food trade and employment data not covered elsewhere.

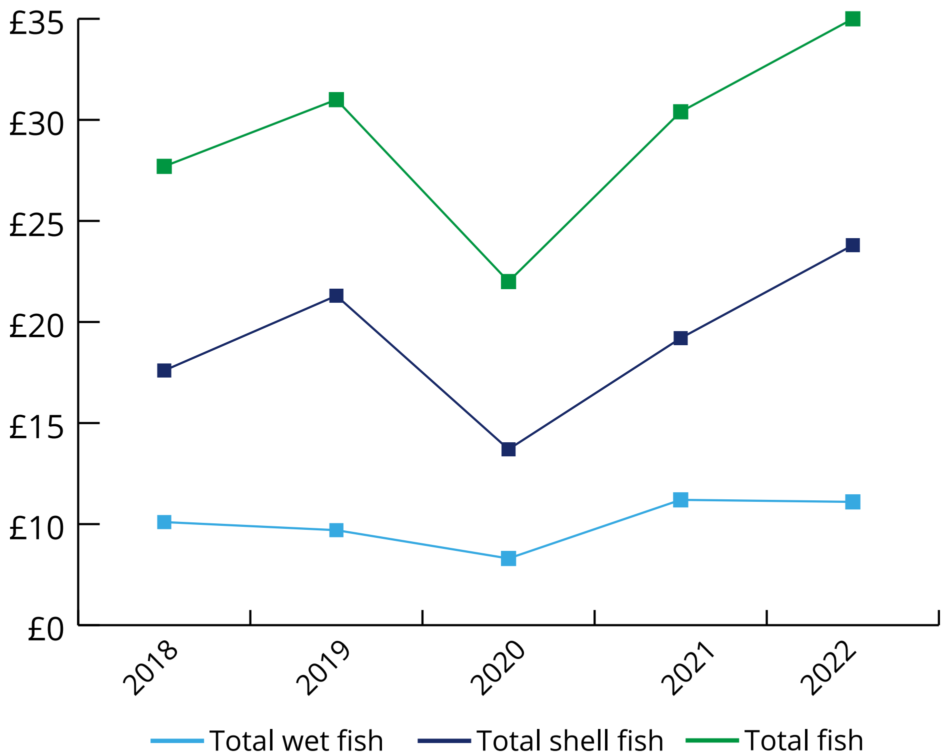
## Summary

- In 2022, the value of fish landings in Northern Ireland were estimated to be £35.0 million and the sector employed 2,183 people.
- In 2023, external sales of live animals were valued at £92.7 million and external purchases of live animals into Northern Ireland were valued at £164.5 million. Export sales of non-edible goods stood at £354.1 million.

## Fish Landings

The value of fish landings into Northern Ireland is estimated to have increased to £35.0 million in 2022 from £30.4 million in 2021; an increase of 15 per cent. This was driven by a 24 per cent increase in the value of shell fish landings from £19.2 million to £23.8 million.

**Figure 6.7: Estimated value of recorded landings of fish into Northern Ireland, 2018-2022, (£ million)**

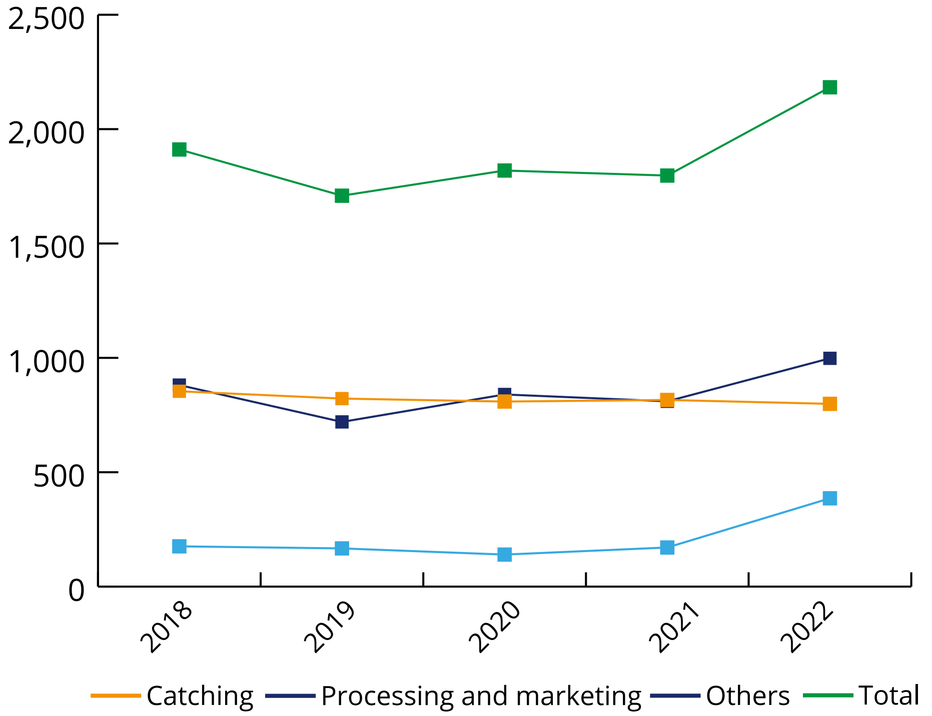



See Table 6.7 Liveweight and estimated value of recorded landings of fish into NI 2018-2022.

## Employment in Northern Ireland Fishing Industry

The total number of people employed in the fishing industry has increased to 2,183 in 2022 from 1,797 in 2021; an increase of 21 per cent.

**Figure 6.8: Employment in Northern Ireland fishing industry (head) 2018-2022**

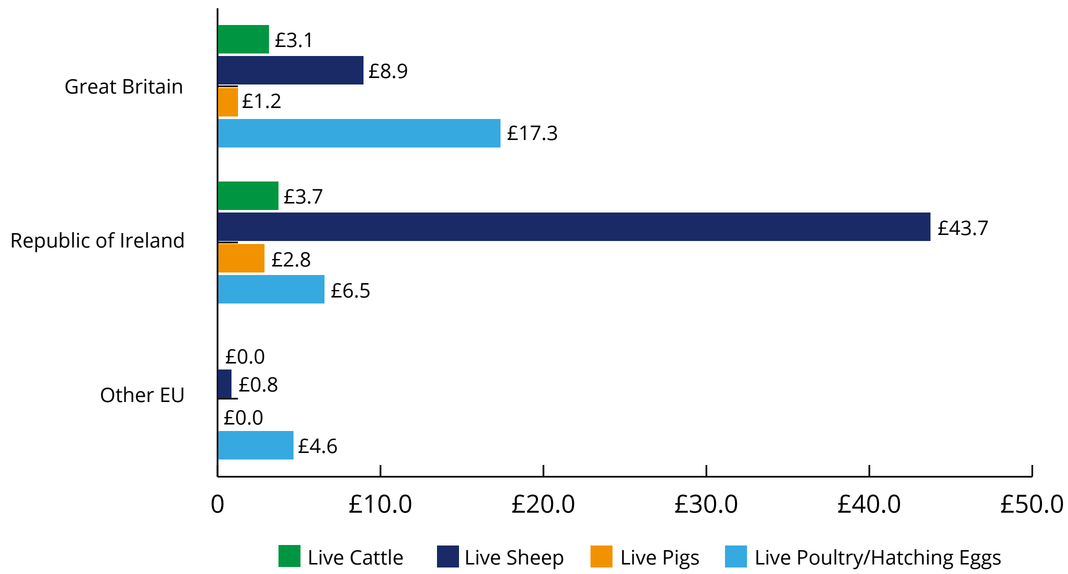



See Table 6.8 Employment in Northern Ireland fishing industry 2018-2022.

## Live Animal Sales

Republic of Ireland was the main destination for NI external live animal sales in 2023 for three out of the four subsectors and accounted for 61 per cent of the total value of external sales.

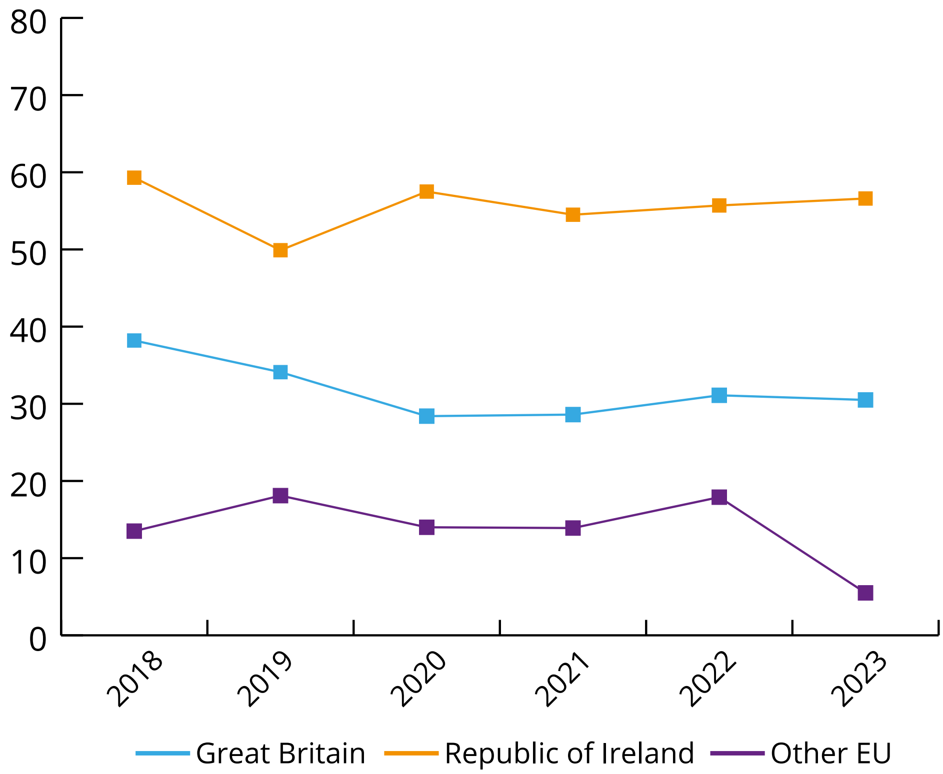
**Figure 6.9: External sales of live animals from Northern Ireland by destination, 2023 (Provisional), (£ million)**




See Table 6.9 External sales of live animals from Northern Ireland by destination, 2023 (Provisional).

The total value of live animal sales to Republic of Ireland increased by £0.9 million in 2023. Sales to Great Britain and Other EU decreased by £0.6 million and £12.4 million respectively. Overall, external sales of live animals fell by 11 per cent from £104.7 million in 2022 to £92.7 million in 2023.

**Figure 6.10: External sales of live animals from Northern Ireland by destination 2018-2023, £ (million)**

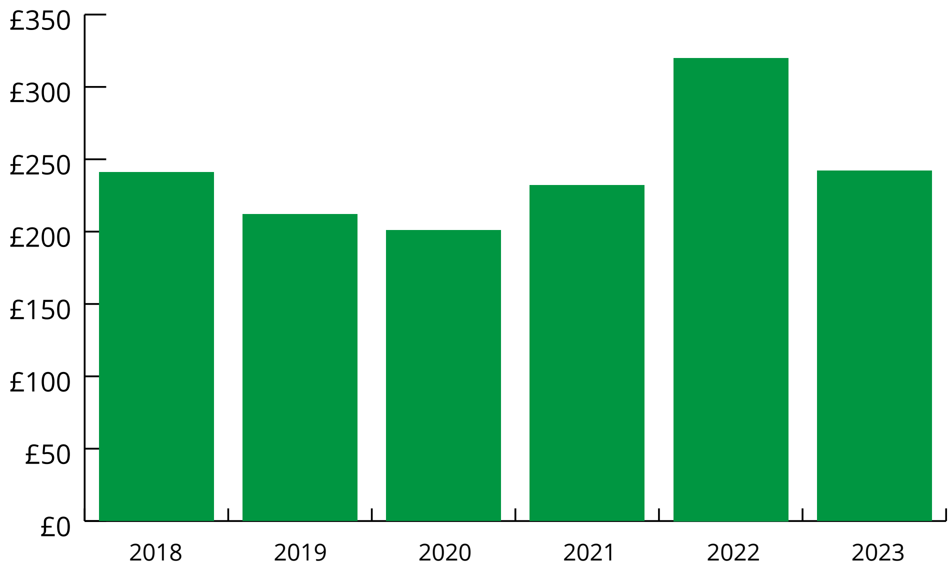



See [Table 6.10 External sales of live animals from Northern Ireland by destination 2018-2023].

## Raw Milk Sales

The value of raw milk sales to the Republic of Ireland have remained above £200 million per annum since 2018. In 2022, raw milk sales reached a high of £320m but fell by 24% to £242m in 2023.

**Figure 6.11: Value of raw milk sales to Republic of Ireland, 2018-2023 (£ million)**

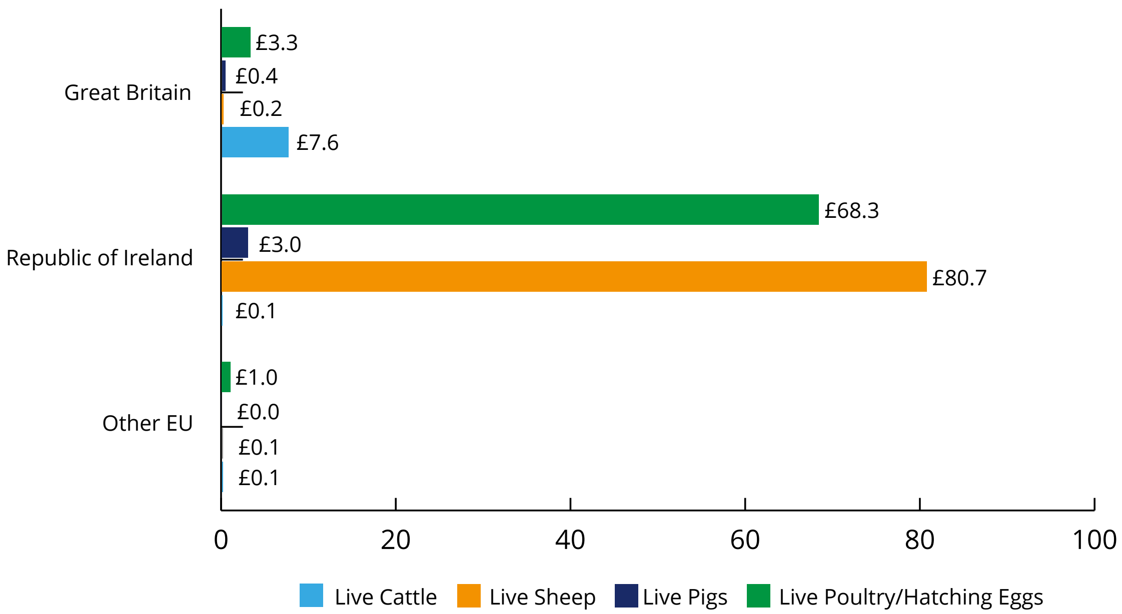



See Table 6.11 Value of raw milk sales to Republic of Ireland 2018-2023.

## Live Animal Purchases

Republic of Ireland was the largest external market for NI live animal purchases for three out of the four subsectors in 2023 and accounted for 92 per cent of the total value of external purchases.

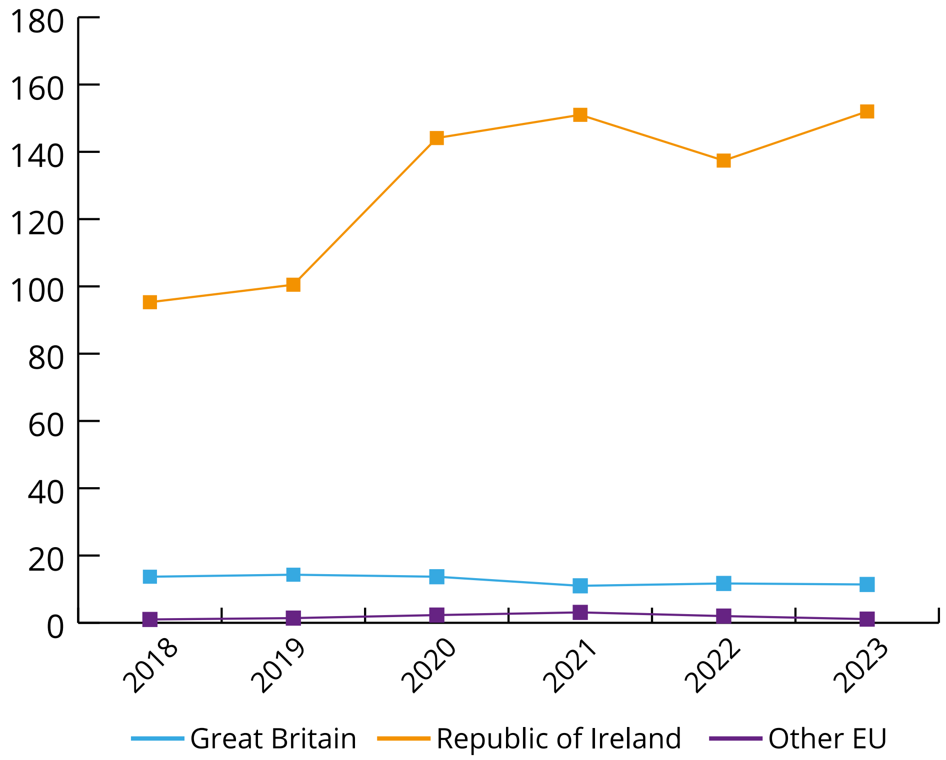
**Figure 6.12: External purchases of live animals to Northern Ireland by origin 2023 (Provisional) (£ million)**




See Table 6.12 External purchases of live animals to Northern Ireland by origin, 2023 (Provisional).

Between 2022 and 2023 total live animal imports from the Republic of Ireland increased by £14.6 million. Purchases from Great Britain and Other EU decreased by £0.3 million and £0.9 million respectively. Overall, total external purchases of live animals increased by 9 per cent from £151.1 million in 2022 to £164.5 million in 2023.

**Figure 6.13: External purchases of live animals to Northern Ireland by origin 2018-2023, (£ million)**

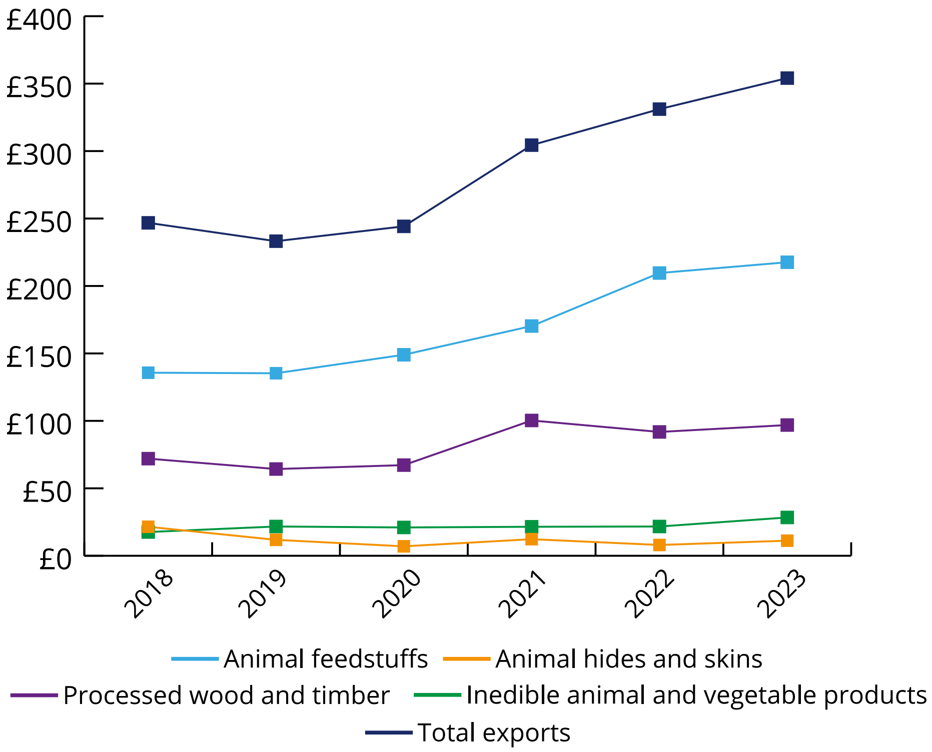



See Table 6.13 External sales of live animals from Northern Ireland by destination 2018-2023.

## Non-Edible Exports

In 2023, the total value of non-edible product export sales increased by £23m; an increase of 7 per cent from 2022. All four subsectors experienced an increase in exports over the period.

**Figure 6.14: Value of non-edible product exports from Northern Ireland 2018-2023 (£ million)**




See Table 6.14 Value of non-edible product exports from Northern Ireland 2018-2023.

# 7. Rural Population

## Summary

- **Rural Population:** At the time of the 2021 NI Census, approximately 61 per cent of people lived in an urban area, with approximately 39 per cent living in a non-urban area (i.e. 'rural' or 'mixed').
- **Income:** Rural households more distant from Belfast continued to have lower average incomes than those closer to Belfast.
- **Businesses:** Agriculture remained the leading industry by far in rural areas in 2023, accounting for approximately 39 per cent of the VAT registered businesses in rural locations.
- **Education:** In 2021/22, school leavers from rural areas were more likely to have achieved more qualifications than their urban counterparts, as well as being more likely to enter higher education (48 per cent, compared with 41 per cent for urban school leavers).
- **Housing:** In 2022/23, owner occupancy rates and average household size continued to be substantially higher in rural areas.
- **Transport and Connectivity:** In 2023, access to superfast broadband in rural areas increased to 93% of residential premises.
- **Health**: In 2023, average life expectancy in rural areas continued to outstrip that in urban areas. Average waiting times for ambulances passed the 30-minute mark in rural areas.

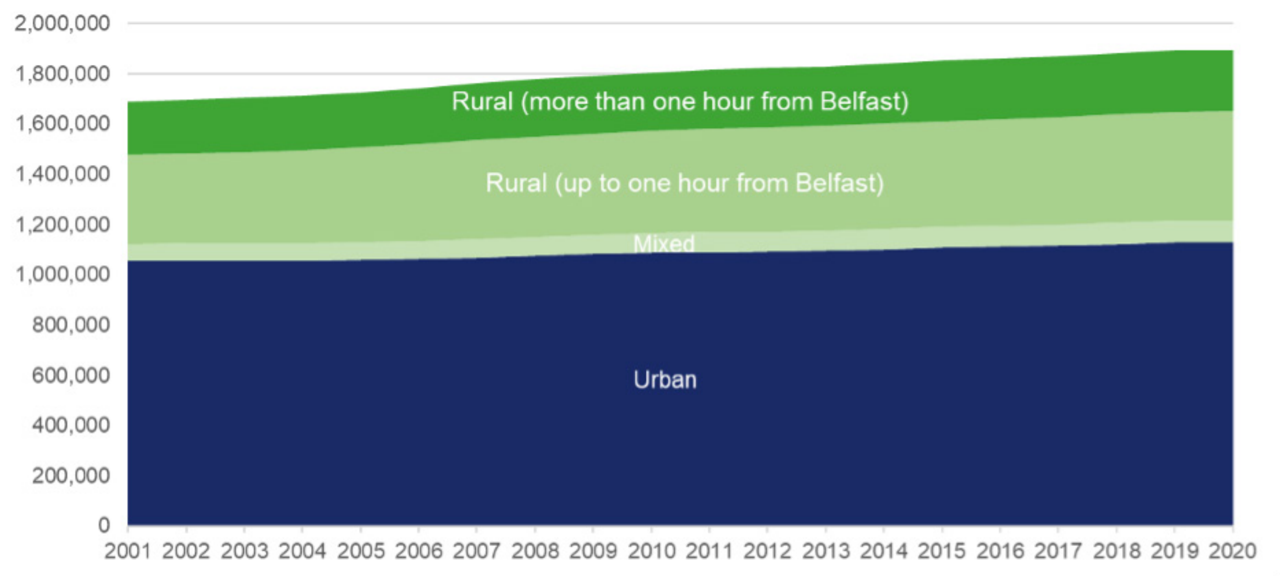
Contact: Des Muldoon, Tel. 028 9052 4802 E-mail: Des.Muldoon@daera-ni.gov.uk

## Rural Population

Due to methodological changes in the 2021 Census, only headline population figures for urban and rural are currently available. Direct comparison of the 2021 figures with the previous mid-year estimates has not been made. The 2021 Census uses 'urban' and 'non-urban' classifications, with the latter encompassing both the previous 'rural' and 'mixed' designations. Population estimates using the previous methodology from 2001-2020 have been provided for context.

| 2021 | Population | Proportion of NI Population |
|---|---|---|
| Urban | 1,165,168 | 61% |
| Non-Urban | 738,007 | 39% |
| NI | **1,903,175** | **100%** |

**Figure 7.1: Population trends in Northern Ireland, 2001-2020**




See Table 7.1 Population Trends in Northern Ireland, 2001-2020.

In 2020, based on mid-year population estimates at small area level, 60 per cent of people in Northern Ireland lived in urban areas, 5 per cent in mixed urban/rural areas and 36 per cent in rural areas. Of those living in rural areas, 60 per cent lived within 20 minutes' drive time of a medium or larger settlement and 63 per cent lived within an hour's drive time from Belfast. Rural and mixed urban/rural areas have experienced a much greater population growth since 2001 than towns and cities, with the biggest increases being in mixed areas, and in rural areas less than an hour's distance from Belfast.

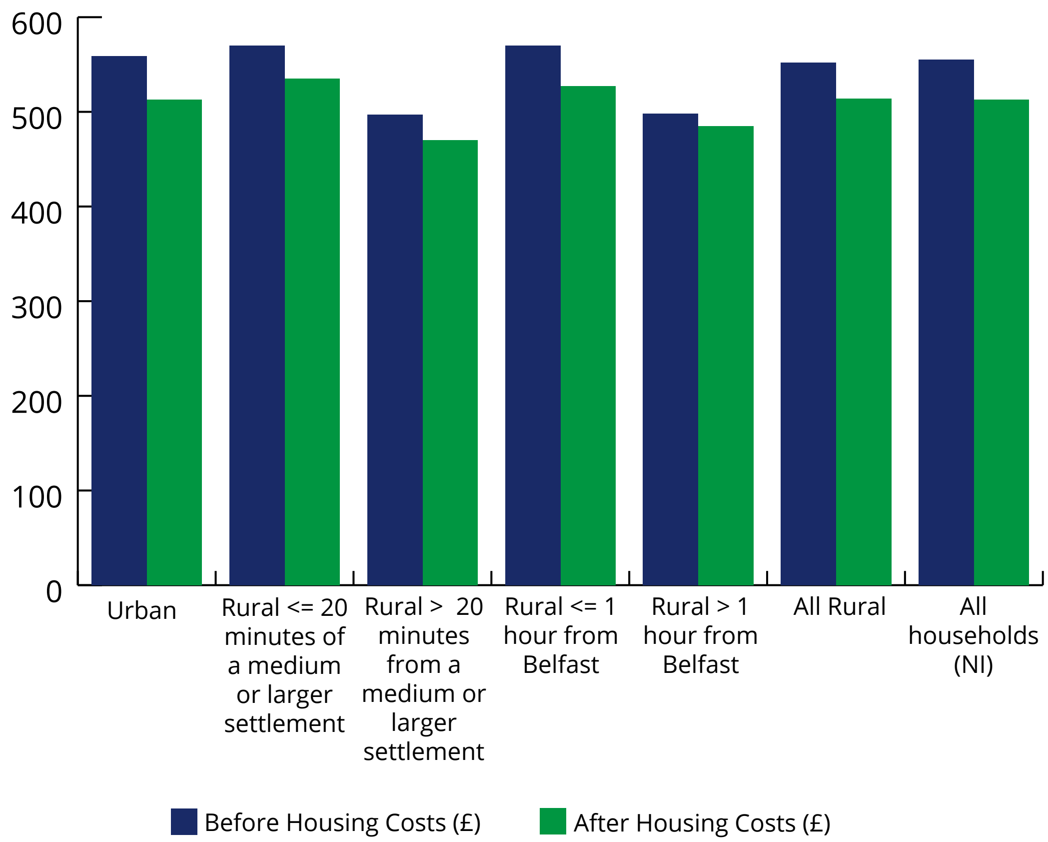
| 2020 | Proportion of NI Population* | % Growth 2001-20 |
|---|---|---|
| Urban | 60% | 6% |
| Mixed | 5% | 32% |
| All Rural | 36% | 19% |

**Percentages may not sum due to rounding*

## Income

The gap in average household incomes between urban and rural households is narrowing. However, there is a difference in incomes between rural dwellers living close to, and those living more distant from Belfast. Rural households located more than an hour's drive from Belfast have lower incomes and a much higher risk of poverty than those closer to Belfast (Figure 7.2).

**Figure 7.2: Median equivalised net disposable weekly household income (£) in Northern Ireland, 2021/22**

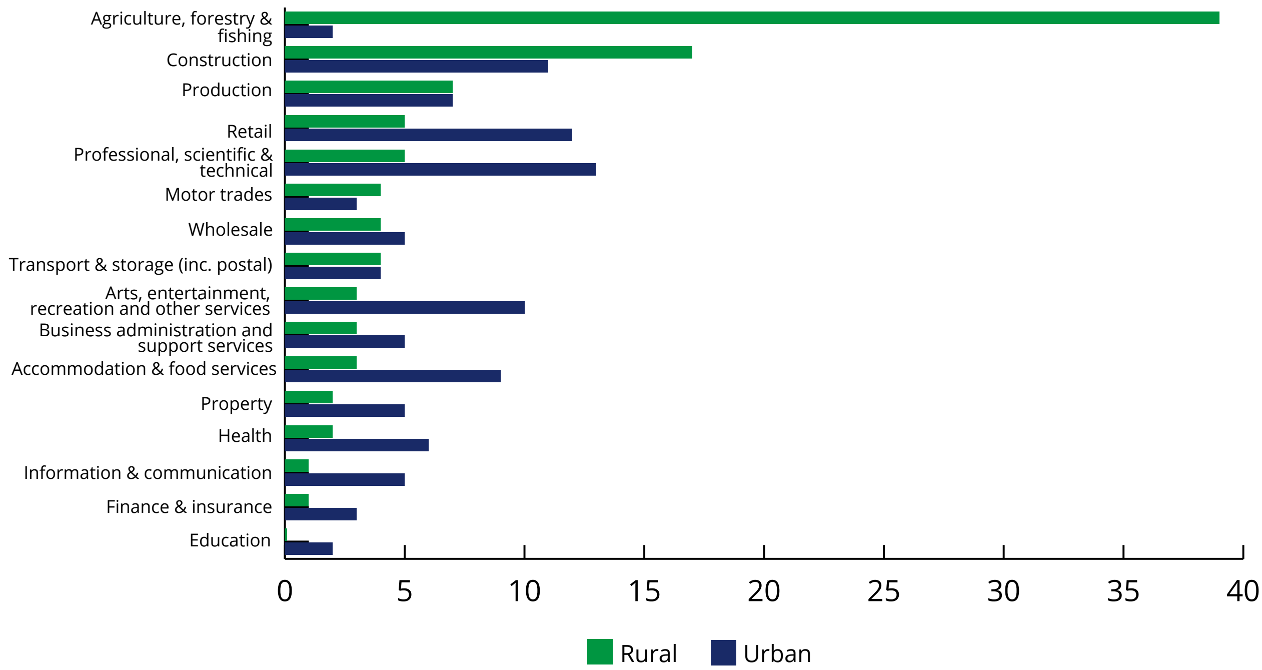



See Table 7.1 and 7.2.

## Businesses

In 2023, there were 79,235 businesses registered for VAT and/or PAYE schemes in Northern Ireland. In 2019, businesses were legally obliged to register for VAT once their turnover exceeded £85,000. Agriculture is by far the leading industry in rural areas, particularly in those which are more than an hour's distance from Belfast. The majority of small businesses without employees are also located in rural areas, reflecting the dominance of agriculture in the rural economy (see Tables 7.3 and 7.4).

**Figure 7.3: Proportion of VAT and/or PAYE registered businesses operating in Northern Ireland by broad industry group, 2023**




See Table 7.3 and 7.4.

## Education

The adult population of more remote rural areas has on average a lower level of formal educational attainment than that of urban areas, whereas those living closer to towns and cities have a higher level of attainment (see Table 7.5). Rural school leavers are more likely to achieve GCSE or A-level qualifications and to enter higher education than their urban peers (Figures 7.4 and 7.5).

**Figure 7.4: Performance of school leavers in Northern Ireland, 2021/22**

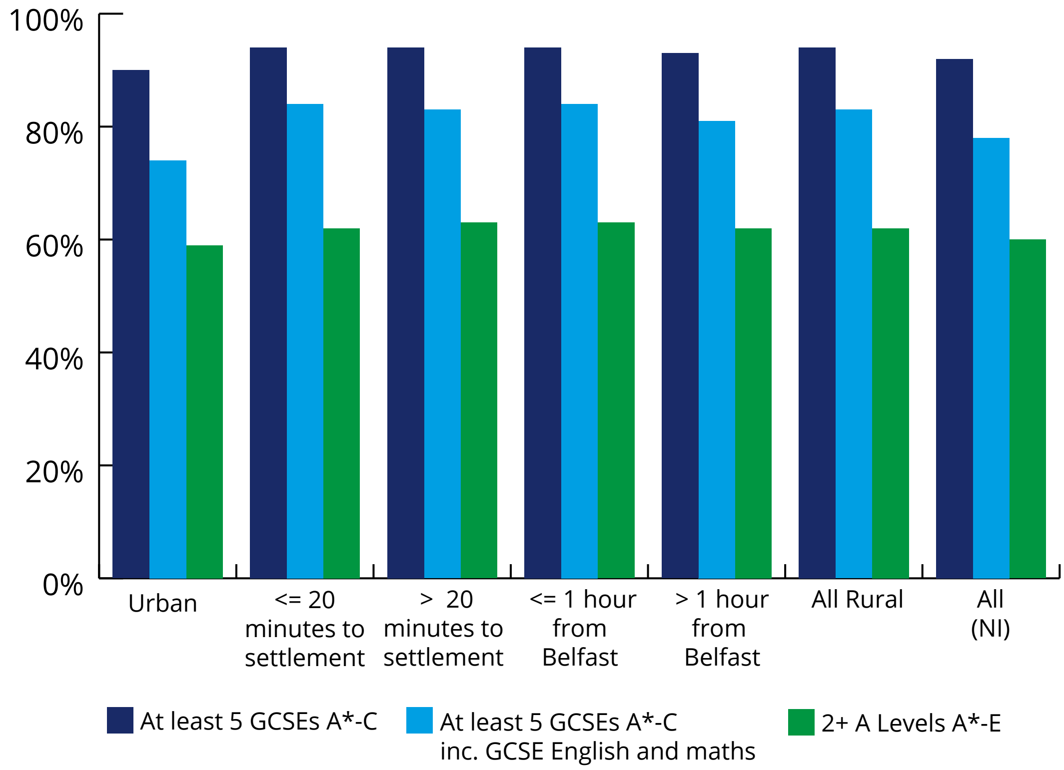
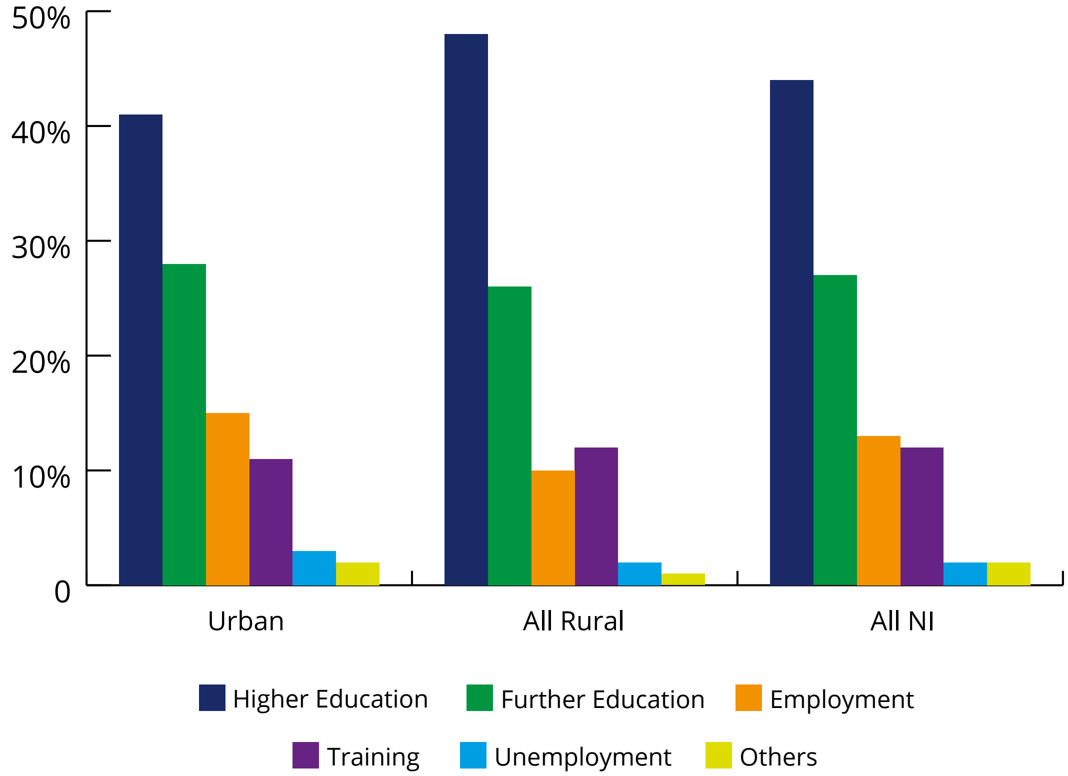


**Figure 7.5: Destinations of school leavers in Northern Ireland, 2021/22**

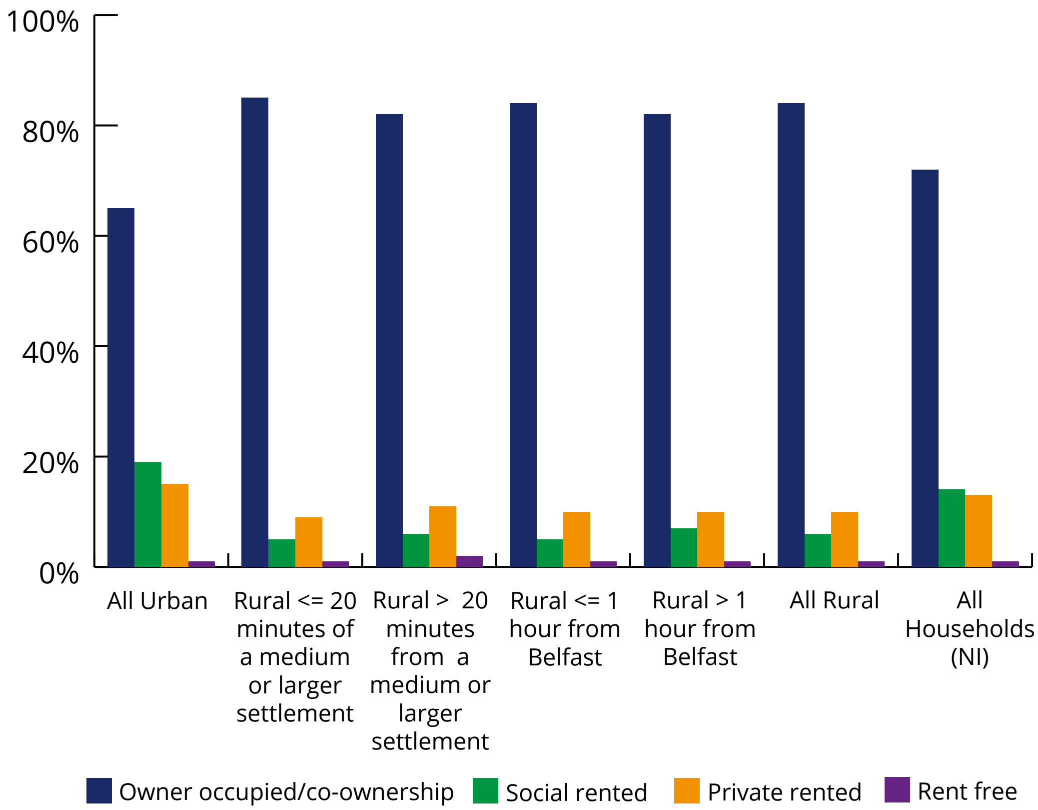



See Table 7.5 - 7.7.

## Housing

Rural areas show a much higher level of home ownership and a much lower level of social renting than urban areas, although the latter may in part reflect availability. House prices are in general higher and have been rising slightly more quickly in rural than in urban areas. The average household size is also higher in rural than in urban areas (see Tables 7.8 - 7.11).

### Figure 7.6: Housing Tenure in Northern Ireland, 2022/23

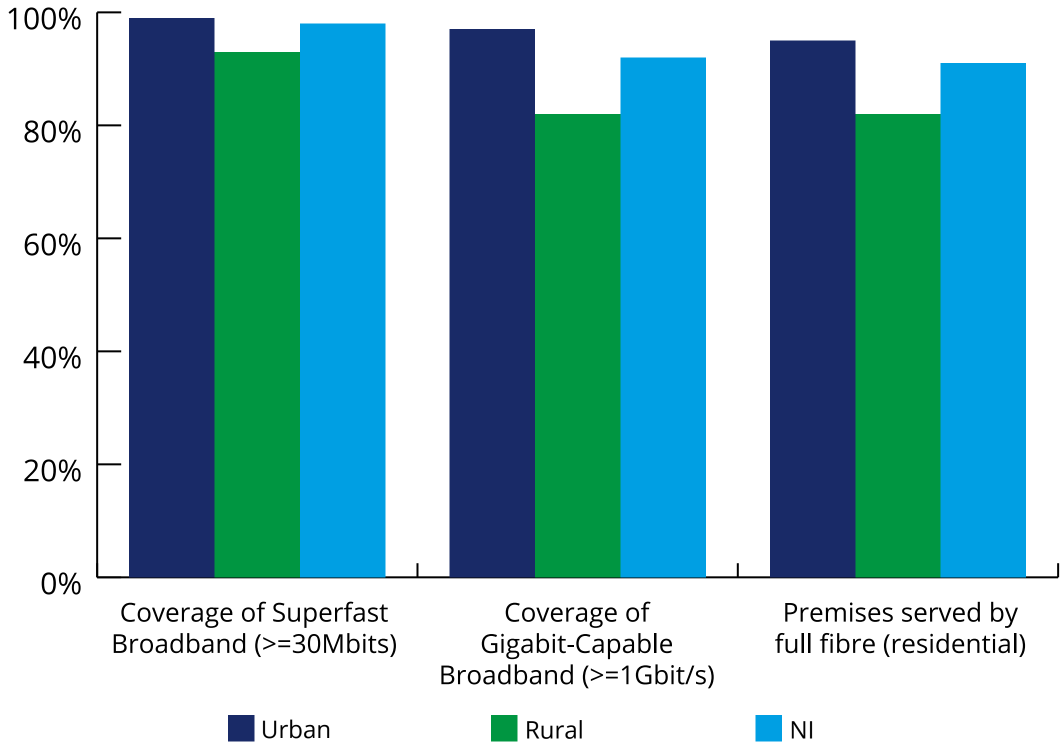



See Table 7.8 - 7.11.

## Transport and Connectivity

Rural dwellers have a heavy reliance on private transport, in comparison to those in urban areas who enjoy much better access to bus and rail services (see Tables 7.11 and 7.12). Broadband speed and availability have both improved significantly in recent years due to the rollout of Project Stratum, with superfast speeds now available to 93% of rural residential premises (see Table 7.13).

**Figure 7.7: Broadband speeds and availability in Northern Ireland, 2023**

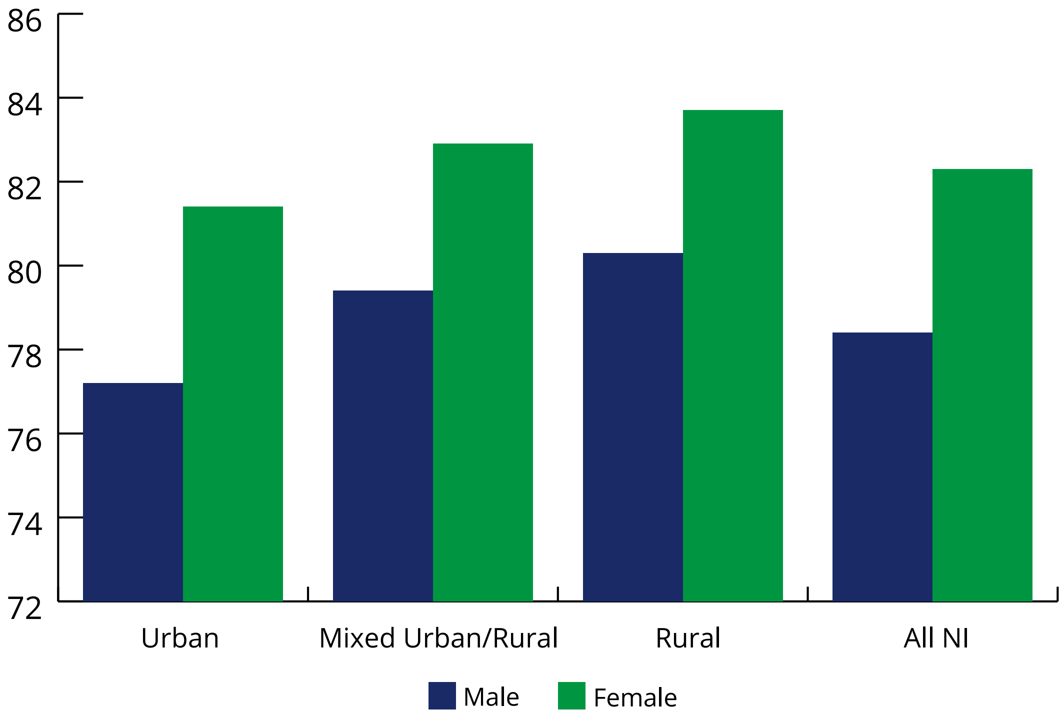



See Table 7.12 - 7.13.

## Health

Average life expectancy is higher and mortality rates are lower in rural than in urban areas (see Tables 7.14 and 7.15). Median fire and ambulance response times continue to increase overall, but are much longer in rural than in urban areas (see Tables 7.16 and 7.17).

**Figure 7.8: Average life expectancy (years) at birth in Northern Ireland, 2020-22**




See Table 7.14 - 7.17.

## Methodological notes

With the exception of Table 7.13, the definition of rural used throughout this section is that provided in the Review of the Statistical Classification and Delineation of Settlements (Northern Ireland Statistics and Research Agency (NISRA) 2015). This classification recommends a default urban-rural boundary at a population threshold of 5,000.

Much of the information included in these tables is aggregated from postcode level data. However, some data is available only at small area and not at postcode level. Small areas which comprise both urban and rural postcodes have been classified by NISRA as 'mixed' rural/urban areas. Therefore, where information is available only at small area level, tables in this section show data for 'mixed' as well as urban and rural areas.

The NISRA 2015 classification also includes a consideration of service provision, achieved by calculating estimated travel times to the location of a major service provider, operationalised as the town centre of a medium or larger settlement (at least 10,000 usual residents). Areas are further classified by their distance to Belfast.

Where data is available, tables in this section provide information for rural areas within or outside a 20 minute drive-time of a medium or larger settlement, and within or outside an hour's distance from Belfast. A full description of the NISRA 2015 settlement classification is available at: http://www.nisra.gov.uk/publications/settlement-2015-documentation

Information in Table 7.13 is based on the Locale definitions of rural and urban used by Ofcom. Locale is a third-party data source which uses a combination of Government conurbation definitions, population density, urban sprawl boundaries, Ordinance Survey roadmaps and visual inspection to classify areas. Details of the Locale definitions are available at: http://www.bluewavegeographics.com/images/LOCALE_Classification.pdf

In the 2021 NI Census of Population, the previous Output Area and Super Output Area geographies have been replaced with Data Zones and Super Data Zones. Urban status is derived by assigning Data Zones as either urban or non-urban. Data Zones with 90% or more of their usual resident population inside the boundary of an urban settlement (i.e. those settlements with population 5,000+ usual residents) are classed as urban. All remaining Data Zones are classed as non-urban.

Further information is available at https://www.nisra.gov.uk/statistics/census/2021-census

# 8. Animal Health and Welfare

## Summary

DAERA is responsible for programmes of animal disease management and eradication, animal welfare surveillance and education of livestock keepers in standards of animal welfare. This chapter provides a compendium of the results from DAERA's disease and animal welfare checks that underpin these programmes.

- During 2023, 8 per cent of the herds tested recorded a positive incident of Bovine Tuberculosis (TB) and 4 per cent of herds tested recorded a positive incident of Bovine Viral Diarrhoea (BVD).
- Random on-farm animal welfare checks found 100 per cent of farms to be compliant while risk assessed targeted checks found 81 per cent to be compliant.

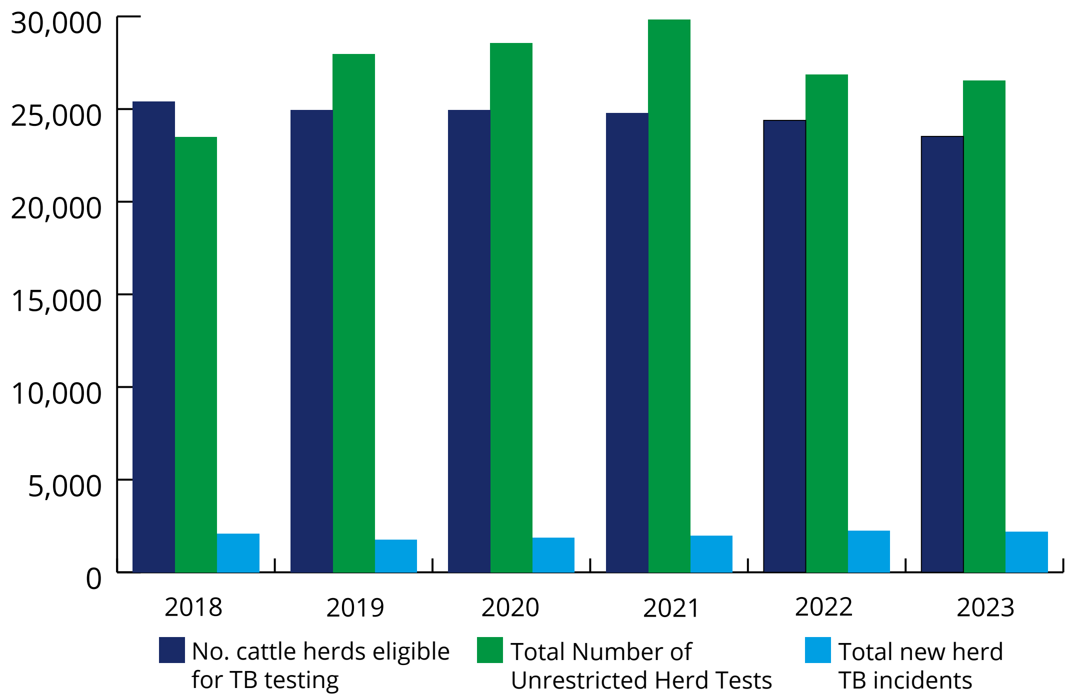
Contact: Philip Hamilton, Tel. 028 9052 4312 E-mail: Philip.Hamilton.@daera-ni.gov.uk

## Disease

Focus has switched to bovine tuberculosis (TB) and bovine viral diarrhoea (BVD) since Northern Ireland achieved "negligible risk status" for bovine spongiform encephalopathy (BSE) in 2017 and official bovine brucellosis (BR) freedom in 2015.

During 2023, there were 2,199 new herd breakdowns in Northern Ireland due to bovine TB. Although, the number of herd incidences is lower than in 2022, it is still higher than any of the annual incidences between 2018 and 2021.

**Figure 8.1: Northern Ireland Bovine Tuberculosis (TB) statistics 2018-2023**




See Table 8.1 Northern Ireland Bovine Tuberculosis (TB) Statistics.

BVD is a highly contagious viral disease of cattle that can be spread directly or indirectly by infected animals.

Compulsory testing began on 1st March 2016 as part of an industry led programme for eradication. In 2023, the animal incidence remains at less than 1 per cent.

**Northern Ireland Bovine Viral Diarrhoea (BVD) Eradication Programme Headline Statistics 2021-2023**

| | 2021 | 2022 | 2023 |
|---|---|---|---|
| Number of Herds with BVD Animal Statuses Set | 16,324 | 16,129 | 15,700 |
| Number of Herds with Positive BVD Animal Statuses (Prevalence) | 847 (5.19%) | 723 (4.48%) | 569 (3.84%) |
| Number of Animals with BVD Status Set | 560,194 | 557,416 | 539,664 |
| Number of Animals with Positive BVD Status (Prevalence) | 1,823 (0.33%) | 1,472 (0.26%) | 1,172 (0.22%) |
| Number of Animals with Inconclusive BVD Status (Prevalence) | 2 (<0.01%) | 4 (<0.01%) | 4 (<0.01%) |

1. Compulsory testing was introduced from 1st March 2016. Before then, participation was on a voluntary basis.

See Table 8.2 Northern Ireland Bovine Viral Diarrhoea (BVD) Eradication Programme Statistics.

## Animal Welfare

Veterinary Service Animal Health Group (VSAHG) carried out 636 on-farm welfare inspections in 2023.

Of the 636 welfare inspections carried out on farms by VSAHG during 2023, 91 per cent were compliant, follow-up, targeted, or cross compliance inspections (where herds are identified as being “at risk”) whereas with the remaining 9 per cent were random cross compliance checks.

Of the 55 random cross compliance inspections in 2023, 100 per cent achieved an overall assessment of compliance with legislation (compared with 100% in 2021 and 98% in 2022).

## Outcomes of on-farm animal welfare inspections completed on Northern Ireland farms in 2023

| Type of inspections | Compliance with animal welfare legislation | Number of Inspections | Category of Non-compliance | Number per category | Percentage of total % |
|---|---|---|---|---|---|
| Cross-compliance programme of random inspections | No | 0 | A<br>B<br>C | 0<br>0<br>0 | 0.00<br>0.00<br>0.00 |
| | Yes | 55 | | 55 | 100.00 |
| | **Total** | **55** | | **55** | **100%** |
| Cross compliance Risk Assessment based, other Targeted and Complaint related inspections | No | 113 | A<br>B<br>C | 66<br>9<br>38 | 11.36<br>1.55<br>6.54 |
| | Yes | 468 | | 468 | 80.55 |
| | **Total** | **581** | | **581** | **100%** |
| All inspections | No | 113 | A<br>B<br>C | 66<br>9<br>38 | 10.38<br>1.42<br>5.97 |
| | Yes | 523 | | 523 | 82.23 |
| | **Total** | **636** | | **636** | **100%** |

1. Reference EC decision 2006/778. Categories of non-compliance are defined as follows:
- Category A: 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: 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: a serious welfare problem requiring immediate action with respect to application of administrative or criminal penalties.

See Table 8.3 Outcomes of on-farm animal welfare inspections completed on Northern Ireland farms in 2023.

Of the complaint follow-up, targeted visits and risk cross compliance inspections, in total 81 per cent achieved compliance with legislation (compared with 79% in 2021 and 87% in 2022). 19 per cent of these 581 inspections indicated levels of non-compliance needing corrective action. This category of inspections carries a higher risk of non-compliance compared to those that are randomly selected from all Northern Ireland keepers as they are identified through known triggers. The vast majority of Northern Ireland herd keepers comply with the legislation.

Taking all welfare inspections into account there were 6 per cent assessed as showing a serious welfare problem requiring immediate action with respect to application of administrative or criminal penalties.

All welfare inspections where a breach is recorded are referred for consideration of basic farm payment scheme penalties.

In 2023, two farm animal keepers were disqualified by the courts as a result of serious welfare breaches.

All complaints and allegations of poor welfare on specific farms are treated as a matter of urgency. DAERA also co-operate closely with other organisations such as PSNI, local District Councils etc.

# 9. Environment

## Summary


- **Greenhouse gas emissions** were estimated to be 21.3 million tonnes of carbon dioxide equivalent ($MtCO_2e$), a decrease of 3.0 per cent compared with 2021 and 26.4 per cent compared with 1990.
- **Water Quality -** In 2021, approximately 31 per cent of river water bodies were classified as 'high' or 'good' ecological status. At 56 of the 60 groundwater monitoring stations (93.3 per cent) nitrate concentrations were consistently below 25 mg $NO_3$/l in 2022. Water pollution incidents rose by 21 per cent to 821 substantiated incidents in 2023.
- **Agri-Environmental Schemes** - By the end of 2023, there were five active tranches of the Environmental Farming Scheme with over 4,800 agreements covering 62,000 hectares of land.
- **Organic Farming** - The area of land farmed organically in Northern Ireland has fallen to 7 thousand hectares which is the lowest level reported since 2004.
- **Forestry** - 433 hectares of new woodland was planted in Northern Ireland in 2023/24, compared to 451 hectares in 2022/23.


Contact: Conor McCormack, Tel. 028 9016 3343
E-mail: Conor.McCormack@daera-ni.gov.uk

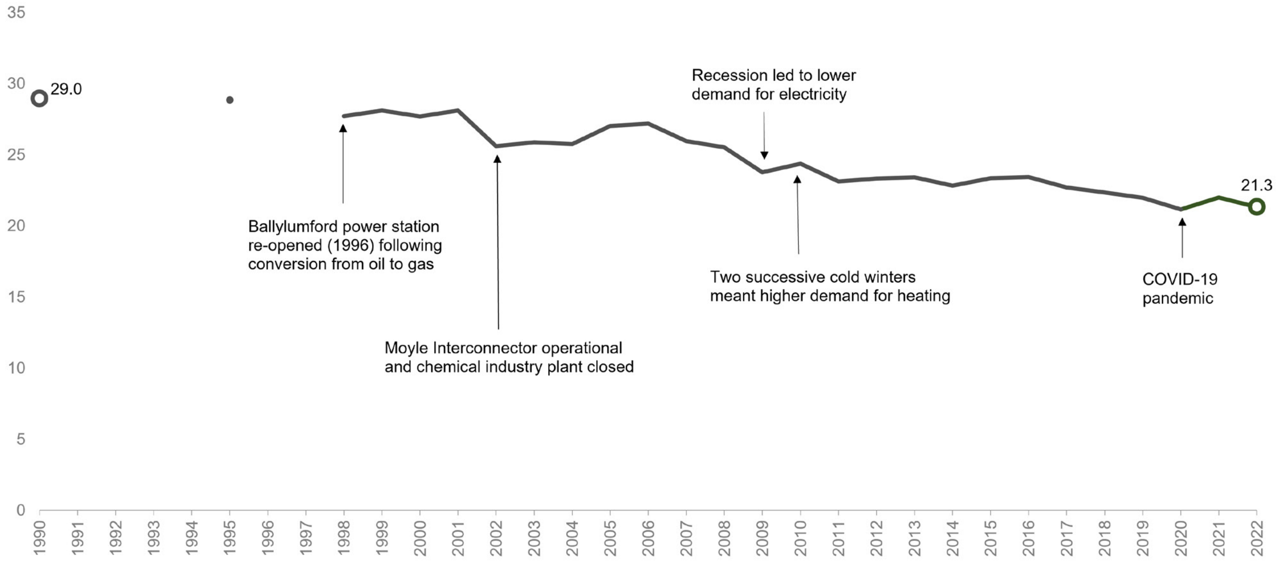
The Northern Ireland Environmental Statistics Report is an annual compendium publication providing estimates for key environmental statistics produced by DAERA. The following information includes statistics from the Environmental Statistics Report along with other DAERA and external publications.

## 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 2022, Northern Ireland's net greenhouse gas emissions were estimated to be 21.3 million tonnes of carbon dioxide equivalent ($MtCO_2e$), a decrease of 3.0 per cent compared with 2021. This net figure is a result of an estimated 23.2 $MtCO_2e$ total emissions, offset by 1.9 $MtCO_2e$ of emissions removed through sequestration. The longer-term trend showed a decrease of 26.4 per cent compared to the base year estimate of 29.0 $MtCO_2e$. The base year is 1990 for carbon dioxide, methane and nitrous oxide, and 1995 for the fluorinated gases.

## Figure 9.1a: Total greenhouse gas emissions in Northern Ireland, 1990, 1995, 1998-2022, $MtCO_2e$




See Table 9.1: Total greenhouse gas emissions 1990-2022.

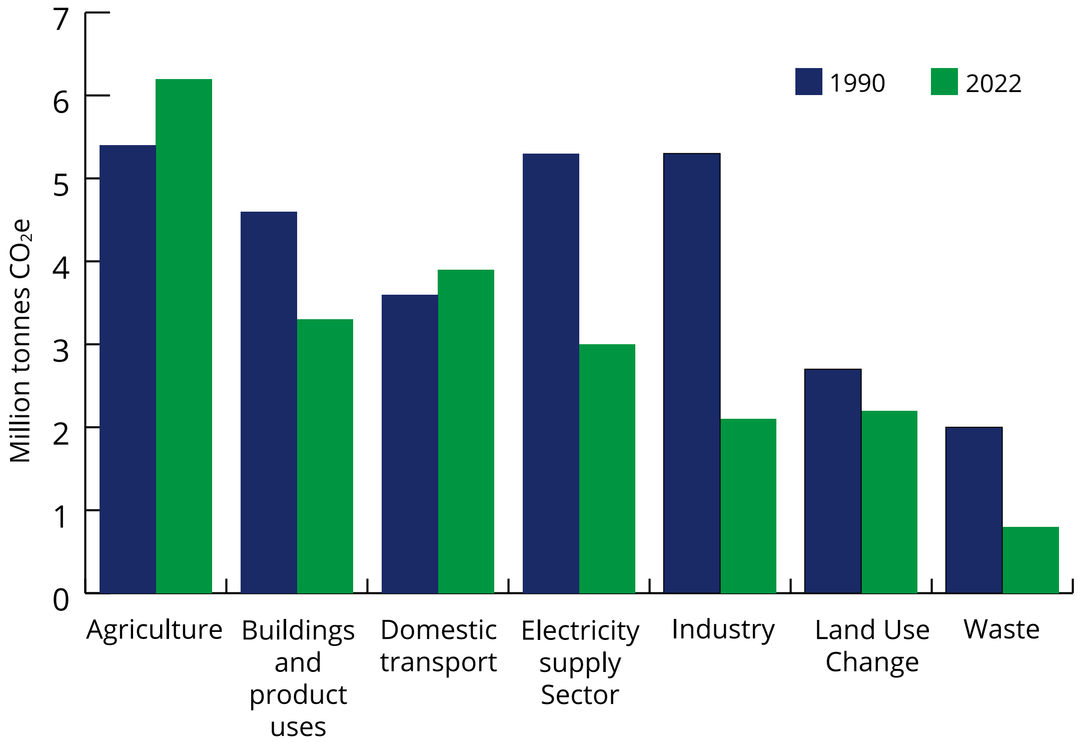
The largest sectors in terms of emissions in 2022 (see figure 9.1b) were agriculture (29 per cent), domestic transport (18 per cent), buildings and product uses (15 per cent) and electricity supply (14 per cent). All sectors, except for domestic transport which reflected the relaxation of COVID19 travel restrictions, showed a decrease in emissions from 2021.

The largest decrease in terms of tonnes of carbon dioxide equivalent was in buildings and product uses (0.4 $MtCO_2e$) with reduced emissions from fuel combustion in residential buildings the main contributory factor. Agriculture, electricity supply, industry and waste all decreased by 0.1 $MtCO_2e$ with the reasons for these cited below:

- Agriculture fell due to reduced emissions from off-road machinery because of less favourable growing conditions for cereals and other crops compared to the previous year.
- Electricity supply emissions fell due to fuel-switching away from oil and coal-fired power-stations and an increase in generation from renewable sources.
- Industry emissions decreased with a reduction in emissions from food and drink industries and cement production primarily responsible.
- Waste emissions fell with a reduction in emissions from landfill sites being primarily responsible.

Further details on Greenhouse Gas Emissions can be found in the following publication: Northern Ireland greenhouse gas inventory.

**Figure 9.1b: Total greenhouse gas emissions in Northern Ireland by sector, 1990 & 2022**




Source: Greenhouse Gas Inventories for England, Scotland, Wales and Northern Ireland: 1990 - 2022.

See Table 9.1: Total greenhouse gas emissions 1990-2022.

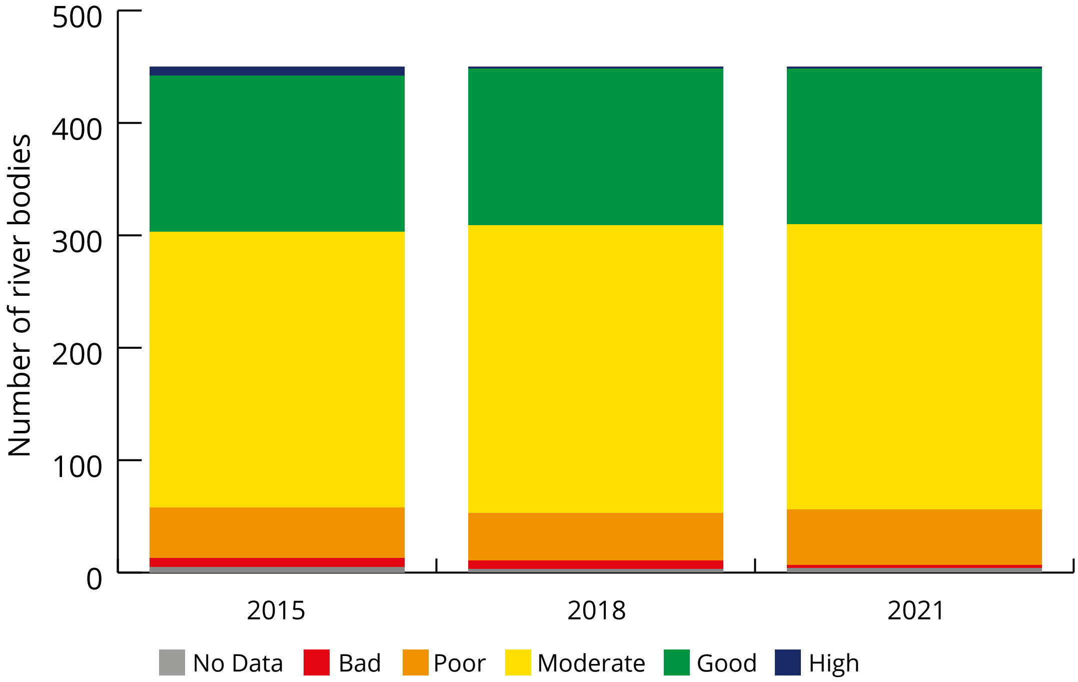
## Water Quality

There are 571 water bodies in Northern Ireland, 496 of these are surface water bodies: including 450 rivers, 21 lakes, and 25 transitional & coastal water bodies (Marine). The remaining 75 are groundwater bodies. For surface waters, ecology and chemistry status of water bodies are assessed using Water Framework Directive (WFD) specifications. Ecology and chemistry status combine to an overall surface water status.

In 2018, new priority substances were introduced to the monitoring programme. For the first time the presence of ubiquitous, persistent, bioaccumulative, toxic (uPBT) substances, so-called 'forever' chemicals, have been assessed as part of chemical status. Due to their bioaccumulative and persistent nature, uPBT substances have been detected at all monitored stations and resulted in failures of all those stations. These failures were extrapolated to all water bodies so no river water bodies achieved good chemical status in 2021 as explained in the latest Northern Ireland Water Framework Directive (WFD) Statistics Report 2021. The WFD report presents ecological and chemical status, as well as overall surface water status to provide more detailed information.

By analysing the ecological status only, it can reflect the key pressures acting upon our water environment such as excess nutrients and organic pollution resulting from agricultural and urban (sewage) land use. The ecology status of river water bodies can be assigned to one of five classes from 'high' through to 'bad'. In 2021, approximately 31 per cent of river water bodies were classified as 'high' or 'good' ecological status. This compares with approximately 31 per cent classified as 'high' or 'good' in 2018 and 33 per cent in 2015.

**Figure 9.2: Northern Ireland river ecological status 2015, 2018 & 2021**

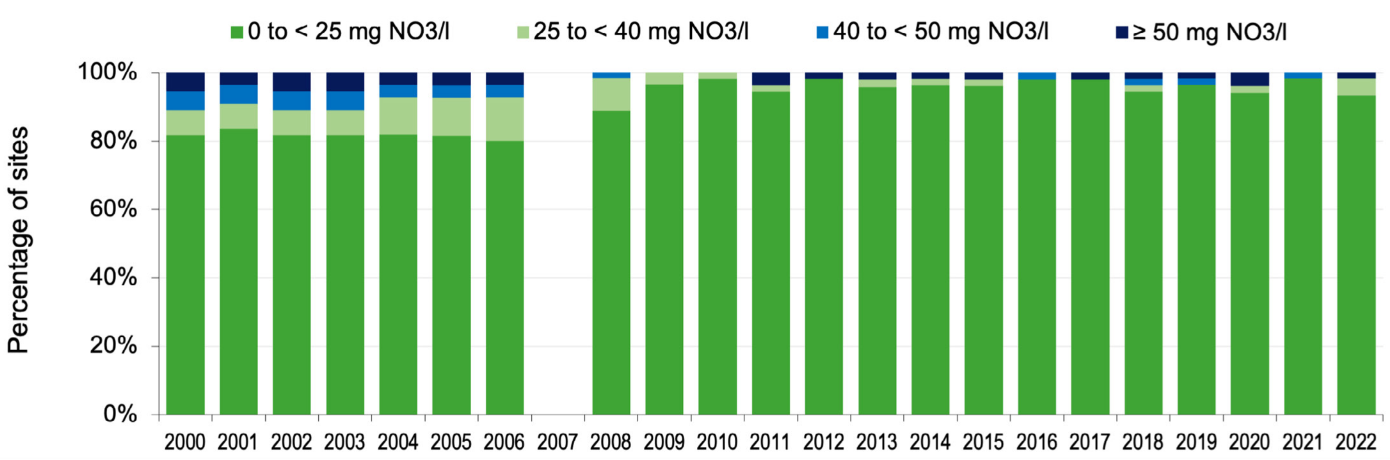



Source: Northern Ireland Water Framework Directive Statistics Report 2021

See Table 9.2: Northern Ireland river ecological status.

Regional monitoring of nitrate concentrations in Groundwater across Northern Ireland began in 2000. The Water (Amendment) (Northern Ireland) (EU Exit) Regulations 2019 ensures that the Water Framework Directive (as transposed) maintains the Groundwater Daughter Directive groundwater quality standard at 50 mg $NO_3$/l. In the period 2000 to 2006, approximately 91 per cent of sites had an annual mean concentration of less than 40 mg $NO_3$/l and approximately 82 per cent were less than 25 mg $NO_3$/l. Regional monitoring re-commenced in 2008, after a major review of the network was undertaken. The figures both pre and post review are broadly comparable. In 2022, nitrate concentrations were monitored at 60 groundwater sites across Northern Ireland giving an average concentration of 5.79 mg $NO_3$/l. At 56 of the 60 groundwater monitoring stations (93.3 per cent) nitrate concentrations were consistently below 25 mg $NO_3$/l.

### Figure 9.3: Annual mean nitrate concentrations (in groundwater) in Northern Ireland, 2000-2022



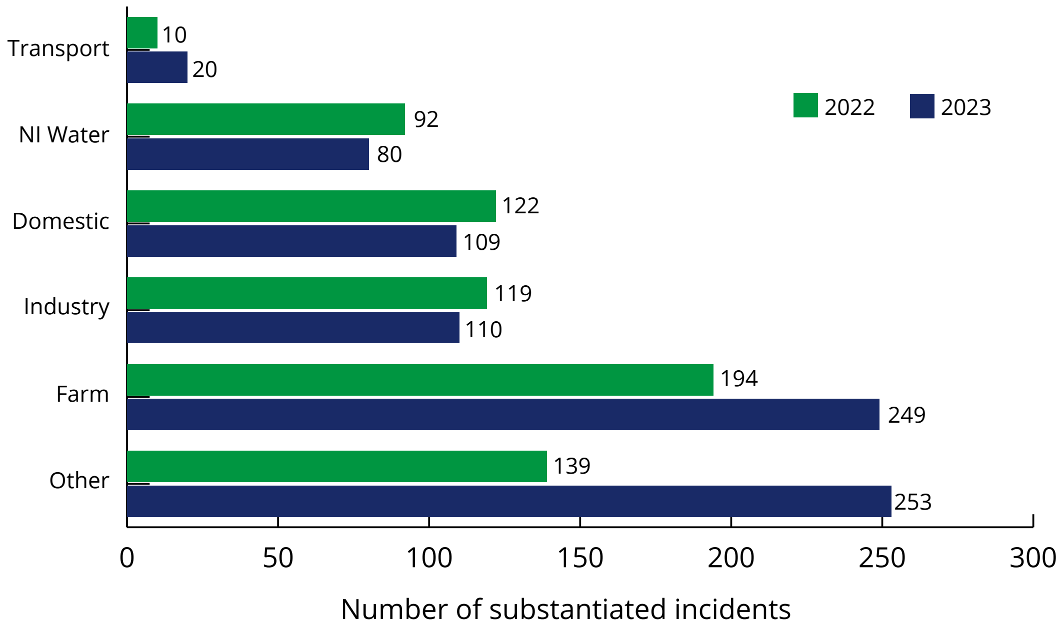

Source: NIEA

*Note: no figures for 2007 as a major review of the network was undertaken during that period.

See Table 9.3: Annual mean nitrate concentrations (in groundwater) in Northern Ireland, 2000-2022.

Figure 9.4 provides information on the source of substantiated water pollution incidents. Water pollution incidents rose by 21 per cent to 821 substantiated incidents in 2023. In 2023, Other (31 per cent), accounted for the largest proportion of substantiated incidents investigated by NIEA, followed by Farm (30 per cent), Industry (13 per cent), Domestic (13 per cent), Northern Ireland Water Ltd (10 per cent) and Transport (2 per cent).

### Figure 9.4: Source of substantiated water pollution incidents in Northern Ireland, 2022 and 2023




Source: NIEA

See Table 9.4 Source of substantiated water pollution incidents in Northern Ireland, 2018-2023.

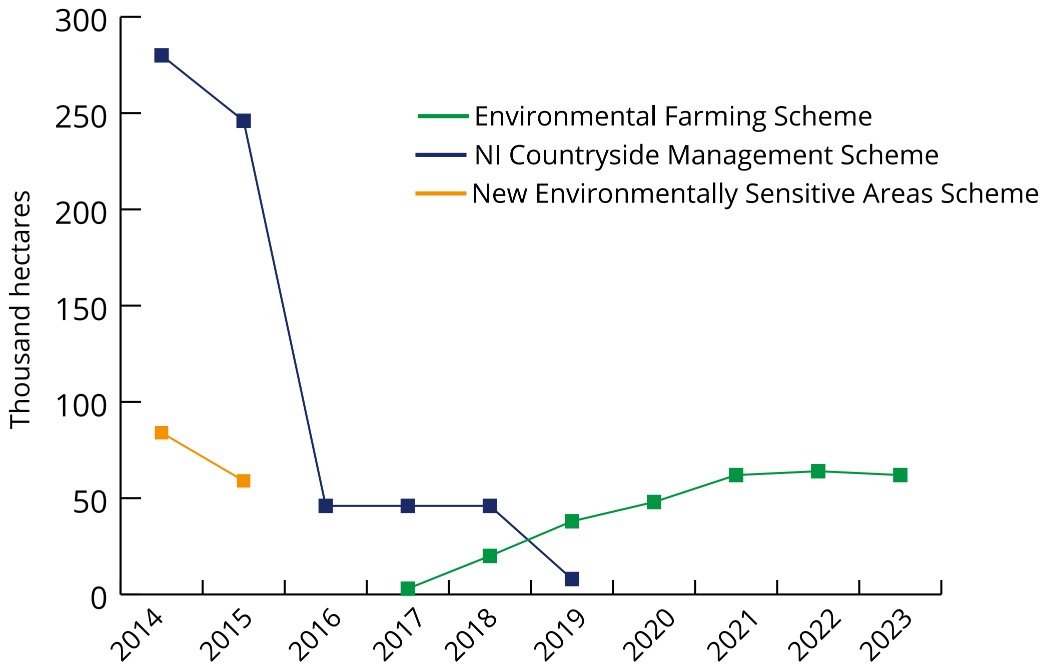
The 82 per cent increase in water pollution incidents attributed to the Other category from 2022 is associated with the 128 substantiated blue green algal bloom events recorded mainly in Lough Neagh, Lower Bann and North Coast during 2023. Water pollution from farms can be diffuse, such as from fertiliser and pesticides spread on the land and point source 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.

## Agri-environmental Schemes

Agri-environmental schemes are managed in Northern Ireland under the Rural Development Programme (RDP). The area of agricultural land managed through these schemes decreased by 85 per cent to 46,000 hectares (approximately 5 per cent of NI farmland) between 2015 and 2016. This was due to the expiration in 2016 of those remaining 10 year agreements from older agri-environment schemes such as the Countryside Management Scheme (CMS) and the Environmentally Sensitive Areas Scheme (ESAS). Within the Northern Ireland Countryside Management Scheme (NICMS), a significant proportion of the total number of agreements also came to the end of their seven year term in late 2015. All NICMS agreements ended on 31st December 2019.

The trends for uptake of agri-environment schemes and the area under agreement have been determined by a number of factors including length of scheme agreement, farmer participation, available funding and resources to manage and deliver schemes.

**Figure 9.5: Area of Farmland in Northern Ireland under Agri-Environmental Schemes, 2014 - 2023**




Source: Countryside Management Unit DAERA

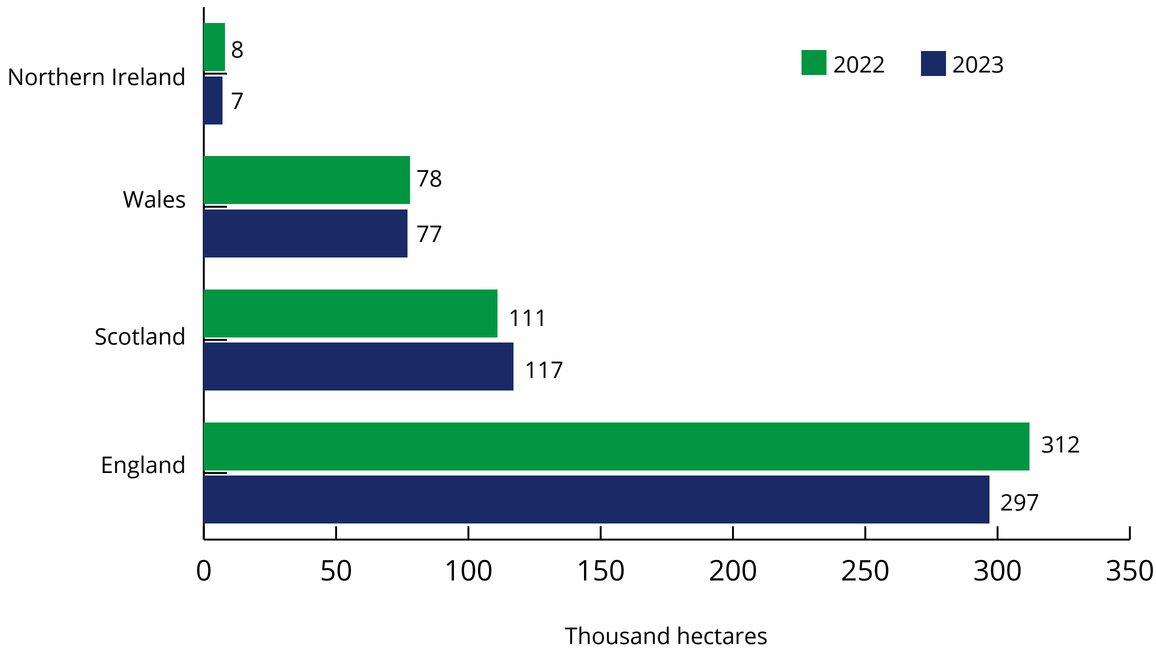
See Table 9.5: Area of farmland in Agri-Environment schemes 2014-2023.

In 2017 DAERA launched its new agri-environment scheme - the Environmental Farming Scheme (EFS). This is a voluntary scheme under the NI Rural Development Programme 2014-2020, which is part financed by the EU. It offers participants a 5-year agreement to deliver a range of environmental measures. By the end of 2023 there were five active tranches of the Environmental Farming Scheme with over 4,800 agreements covering 62,000 hectares of land.

## 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. Northern Ireland has the lowest proportions of farmland under organic management in the UK.

**Figure 9.6: United Kingdom organic and organic in-conversion agricultural land area, 2022 - 2023**




Source: Organic farming statistics 2023.

See Table 9.6: Organic and organic in-conversion agricultural land area 2018-2023.

The area of land farmed organically in Northern Ireland has fallen to 7 thousand hectares which is the lowest level reported since 2004. The total organic and organic in conversion agricultural land area in the UK overall was 498 thousand hectares in 2023, 11 thousand hectares fewer (2.1 per cent decrease) than in 2022.

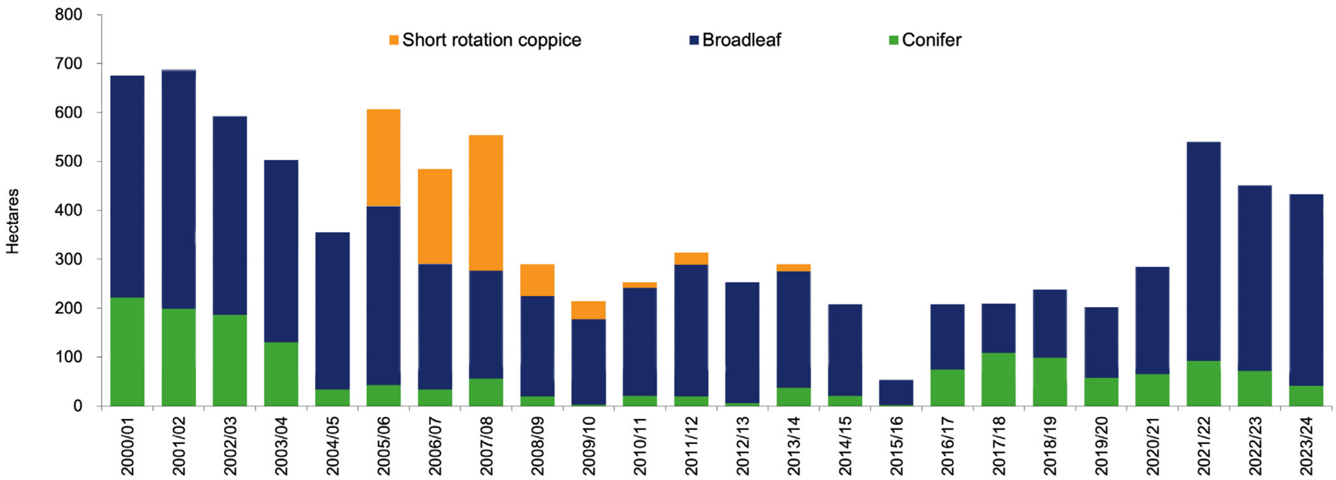
## Forestry

In Northern Ireland the state-owned forest area has changed little since 2000. In 2012 the Northern Ireland Woodland Base-map incorporated new woodland data from the DAERA Land Parcel Identification System (LPIS) project. This has contributed a significant additional area of woodland that had not previously been captured by any of the original datasets. Remote sensing was used to identify significant areas of nonwoodland and the removal of these also resulted in an improved estimate. The area of privately owned forest area is estimated to be 56 thousand hectares as of 31 March 2023. See table 9.7a in the accompanying statistical review tables file for time-series information on forestry area. Privately-owned forest area data for the years prior to 2011/12 are now thought to be under-estimates.

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 2023, 13 per cent of the UK was wooded.

Grant support to encourage afforestation and sustainable management of privately owned woodlands is provided by forestry measures in the Rural Development Programme. When combined with NI Forest Service planting, 433 hectares of new woodland was planted in 2023/24, compared to 451 hectares in 2022/23.

### Figure 9.7: Area of new forest and woodland plantings by private landowners supported by grant aid and NI Forest Service plantings, 2000/01 - 2023/24

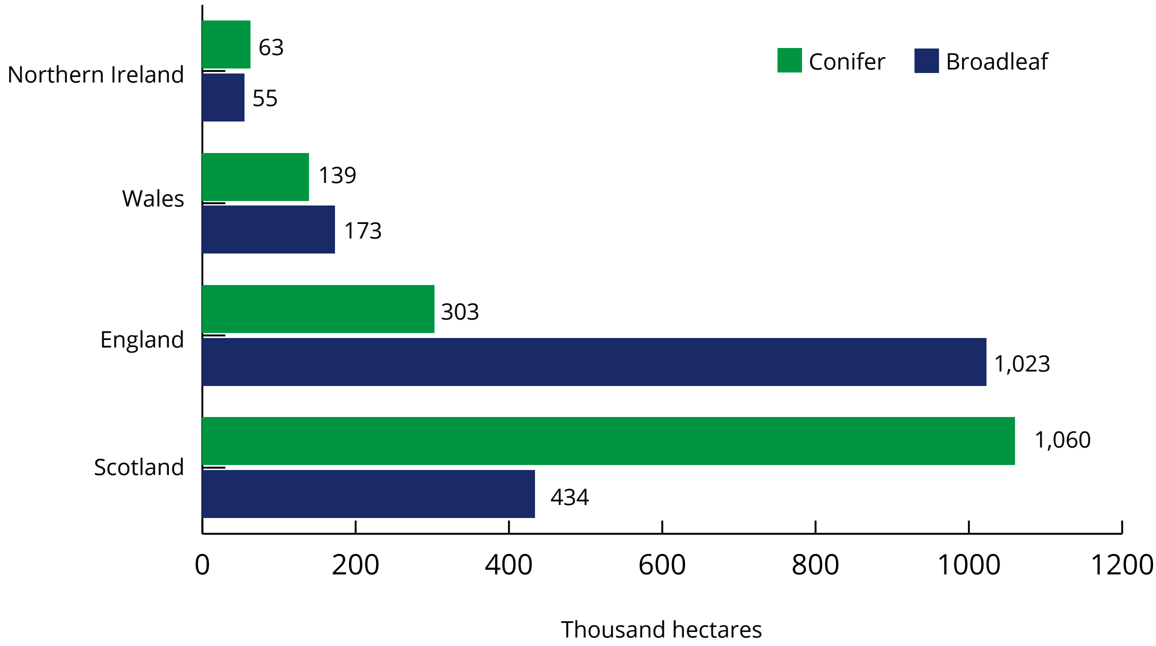



Source: Northern Ireland Forest Service.

See [Table 9.7 Area of new forest and woodland plantings by private landowners supported by grant aid and NI Forest Service planting, 2000/01 – 2023/24].

Northern Ireland has approximately nine per cent of total land area in forestry compared to a UK average of 13 per cent. The chart below shows the area of conifer and broadleaf woodland throughout the UK regions. Scotland has the largest area of conifers while England has the largest area of broadleaves.

**Figure 9.8: Area of woodland throughout the United Kingdom by forest type, 2023**




Source: Forestry Statistics and Forestry Facts & Figures.

See Table 9.8: Area of woodland throughout the UK by forest type, 2023.

# Notes for Readers Section

## 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.

(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.

(iii) Rent paid on 'conacre' (short-term lettings) to non-farming persons is included as an expense.

(iv) Capital formation in, and depreciation of, breeding livestock is 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.

**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 all farm families in NI 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 2022 would change by around +9 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 2023 presented in this Review are estimates based on data available during the period from December 2022 to January 2024, in most cases covering only the first 9-11 months of the year (2023). Forecasts are used to cover the months where no data is 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 2022 figures have been revised as more complete information has become available. Net value added in 2022 is now estimated at £798.8 million (previously £794.1 million) while total income from farming for 2022 is now estimated at £608.9 million (previously £604.6 million). A 30-year plus consistent series of the AAA is available on the DAERA website at www.daera-ni.gov.uk.

**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 an annual statistical survey which is based on a large sample survey. From 2020 a revised methodology was used to create the census sample using Departmental Administration data.

All farms were contacted and invited to participate in the survey. In response to COVID-19, the data collection for the 2020 Farm Census moved entirely online for the first time.

For farms that failed to submit an online response, estimates were completed for crop areas, livestock and labour figures. For the most part, these estimates were based on data collated from other administrative systems within the Department, or from the latest return from each farm, or in some cases farms with substantive numbers or areas of pigs, poultry or mushrooms were telephoned for information. The statistics are thus compiled from a survey of farm businesses augmented by administrative data. This has enabled detailed farm census statistics to be produced.

Further information on methodology and quality of the farm census data is available at: https://www.daera-ni.gov.uk/publications/agricultural-census-northern-irelandmethodology-and-quality-report

**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.

In the Northern Ireland 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 where a higher minimum size threshold is applied.

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.

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 |

performance indicators for the **food and drinks processing sector** indicate an increase in gross turnover between 2016 and 2021. Employment has also grown over the period. Exports account for 29 per cent of sales by the food and drinks processing sector.

| | |
|---|---|
| 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. |
| 2011-2012 | Sample survey completed similar to years 2007 -2009. |
| 2013 | Sample survey completed similar to 2011-2012. Pig questions removed from paper form. Data on pigs sourced from NI Annual Inventory of Pigs. |
| 2020 on | A full census of all farm businesses in Northern Ireland was completed. The farm census population was sourced using available departmental administrative data and estimation processes were updated and improved. Survey was completed entirely online for the first time. Questionnaire was streamlined and shortened to reduce burden on farmers and encourage online completion. |

**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 | Fruit | ha | 450 |
| Ornamentals | 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 |
| 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 |

| Enterprise | Item | Unit | Standard Labour Requirement (hours) |
|---|---|---|---|
| Pigs | Sows and gilts<br>Piglets<br>Other pigs | head<br>head<br>head | 16<br>1.0<br>1.3 |
| Poultry | Laying hens<br>Pullets<br>Broilers<br>Turkeys, Ducks etc. | head<br>head<br>head<br>head | 0.17<br>0.12<br>0.04<br>0.045 |
| Other Livestock | Horses<br>Goats<br>Deer | head<br>head<br>head | 150<br>20<br>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 type**[4] The system of classifying farms according to the type of farming found on a holding is set out in Commission Regulation (EC) 1242/2008 and explained in greater detail in the EU Farm Accountancy Data Network (FADN) Typology Handbook RI/CC 1500 rev.3.

Depending on the amount of detail required, farms can be classified into 1 of 62 types. Individual farms are allocated to a type category on the basis of the aggregate value of farm outputs. As it is not feasible to estimate the value of outputs on a farm-by-farm basis, Standard Outputs (SOs) are calculated as reference values for a variety of farm products. The SO of a specific product (crop or livestock) is the average monetary value (per ha or head) of agricultural output based on regional farm-gate prices over a 5 year period. The SO excludes direct payments and no costs are deducted. Once the numbers of livestock and hectares of crop for an individual farm have been multiplied by

4 The EU typology has been updated from 2010 Standard Output coefficients to 2013 coefficients during 2020.

the relevant SOs, it is allocated to a type category depending on where most of the total SO comes from. To ensure a stable framework for comparison and analysis SO values, once calculated, are held constant for a number of years. The SO values in use at the moment cover the five year period centred on 2013.

For UK statistical purposes, the 62 farm types (not all of which are found in Northern Ireland) are grouped into 10 ‘robust’ categories which have particular relevance to UK conditions. These are:

| Type | Definition |
|---|---|
| **Cereals** | Farms on which cereals and combinable crops account for more than two-thirds of the total SO. |
| **General cropping** | Farms which do not qualify as cereals farms but have more than two-thirds of the total SO in arable, including field scale vegetable, crops or in a mixture of arable and horticultural crops where arable crops account for more than one-third of the total SO and no other grouping accounts for more than one-third. In addition, farms with a substantial area of grassland but few livestock are also included within this farm type. |
| **Horticulture** | Farms with more than two-thirds of the total SO in horticultural crops (including specialist mushroom growers). |
| **Specialist pigs** | Farms of which pigs account for more than two-thirds of total SO. |
| **Specialist poultry** | Farms on which poultry account for more than two-thirds of total SO. |
| **Dairy** | Farms on which dairy cows account for more than two-thirds of the total SO. |
| **Grazing livestock (LFA)** | Farms wholly or mainly in the Less Favoured Areas which do not qualify as Dairy farms but have more than two-thirds of their total SO in grazing livestock (cattle and sheep). |
| **Grazing livestock (Lowland)** | Farms wholly or mainly outside the Less Favoured Area which do not qualify as Dairy farms but have more than two-thirds their total SO in grazing livestock (cattle and sheep). |
| **Mixed** | Farms that have no dominant enterprise and do not fit into the above categories. |
| **Other types** | Farms that specialise in enterprises which do not fit the definitions of mainstream agricultural activities. For the most part this category is made up of specialist horse farms plus other farms that are unclassified. |

**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, Economics & Statistics Division of the Department of Agriculture, Environment and Rural Affairs. Similar surveys are carried out in England by DEFRA, in Scotland by Scottish Government, and in Wales by WAG.

In the most recent accounting year, 2022/23, the FBS obtained farm accounts information from 270 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. For example, 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 livestock, 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 |

Policy, Economics and Statistics Division
Department of Agriculture, Environment and Rural Affairs
Clare House
303 Airport Road West
Sydenham Intake
Belfast
BT3 9ED

Department of
Agriculture, Environment
and Rural Affairs
An Roinn
Talmhaíochta, Comhshaoil
agus Gnóthaí Tuaithe
Depairtment o'
Fairmin, Environment
an' Kintra Matthers
www.daera-ni.gov.uk

INVESTORS IN PEOPLE®
We invest in people Standard

24.24.095