

Updates Since Previous Version (April 2012)

Census of Agriculture 2010, Employment, Exports, Input & Output, Farm Income etc.

A: Role of Agriculture, Fisheries, Forestry and Food in the Irish Economy

Key Indicators for Primary and Agri-Food Sectors			Employment in the Agri-Food Sector (000s)
Relevant Year in brackets.	Primary Sector ¹	Agri-Food Sector ²	<p>Based on the latest (Q2, 2012) CSO Quarterly National Household Survey data. The CSO has indicated that results of its Census of Agriculture 2010 will provide a more accurate picture of employment in the sector.</p>
% of GVA at factor cost (2011)	2.7%	7.7%	
% of employment (2012-Q2)	4.9%	7.9%	
% of exports (2011)	7.1%	10.6%	
According to the Census of Industrial Production 2010 the Food & Beverages Sector accounts for: <p style="text-align: center;">23% of all Industry Turnover (26% of all Manufacturing Industry Turnover)</p> <p style="text-align: center;">21% of all Industry Gross Output (23% of all Manufacturing Industry Gross Output)</p>			

B: Public Expenditure and Agriculture Related Payments

Total public expenditure on the agri-food sector by the Department of Agriculture, Food and the Marine was approximately €2.8 billion in 2011. DAFM payments in 2011 totalled €2.1 billion, including Single Farm Payment, Rural Development, Structural and Forestry payments.

DAFM Expenditure on Irish Agriculture, 2011	
1 January to 31 December 2011	€m
EAGGF Guarantee direct expenditure	1,375.6
Single Farm Payment	1,316.0
Grassland Sheep, Burren Life, Dairy Efficiency Schemes	22.5
Private Storage	3.2
Export Refunds	2.0
Other Market Supports & Recoveries	31.9
Voted Expenditure (excluding Administration)	1,183.9
Rural Development	538.5
Structural Measures	61.8
State Bodies	200.6
Horse and Greyhound Fund	57.3
Animal Health	124.3
Research and Training	35.2
Market Support Costs	13.1
Forestry and Bio-Fuels	116.5
Fisheries	11.8
Food Aid	9.9
Other	14.9
Administration	237.4
Total Voted Expenditure	1,421.3
Total DAFM Expenditure	2,796.9

¹ Primary sector taken to comprise Agriculture, Fisheries and Forestry.

² Taken to comprise primary production, food, beverages & tobacco and wood processing sectors. Source: CSO and DAFM. Data are estimates.

C: Estimates of Aggregate Agricultural Output, Input and Income - CSO

- The CSO's Advance Estimate of operating surplus in agriculture in 2012 was €2,183 million, a decrease of 10.4% on 2011.
- In 2012, direct payments, net of levies, accounted for 76% of operating surplus.
- Beef and milk production currently account for about 68% of agricultural output at producer prices (excluding forage).

Output, Input and Income in Agriculture, 2012					
Main Aggregates	Value €m		Main Commodities	Value €m	% of G/O
Goods Output @ Producer Prices ⁽¹⁾	6,534.60		Goods Output (excl forage)	5,419.40	100%
+ Contract Work	352.40		<i>of which</i>		
+ Subsidies - Taxes (Products)	-12.60		Cattle	2,077.60	38.3%
Agricultural Output @ Basic Prices	6,874.40		Milk	1,596.80	29.5%
- Intermediate Consumption	5,189.10		Pigs	432.70	8.0%
Gross Value Added @ Basic Prices	1,685.30		Sheep	209.00	3.9%
- Fixed Capital Consumption	706.90		Cereals	274.70	5.1%
+ Subsidies - Taxes (Production)	1,661.40		Others	828.60	15.3%
- Compensation of Employees	456.70		Forage Plants	1,115.20	
Operating Surplus	2,183.00		Goods Output at Producer Prices ⁽¹⁾	6,534.60	
¹ Including Forage					
Source: CSO Output, Input and Income in Agriculture - 2012 Advance Estimate (December 2012)					

D: Estimates of Family Farm and Farm Household Income

- The 2011 National Farm Survey (NFS) from Teagasc estimates **that average farm income (excluding off-farm income) increased by 30% in 2011 to €24,461**. Full-time farms, as defined by Teagasc, had an average farm income of **€56,378**, while the part-time equivalent was **€10,408**.
- The 2011 NFS also estimated that on **50% of farms the holder and/or spouse had an off-farm job, down from 51% in 2010. 78% of farmers and/or their spouses had an off-farm source of income** either from employment, pensions or social assistance.

E: Farm Structures

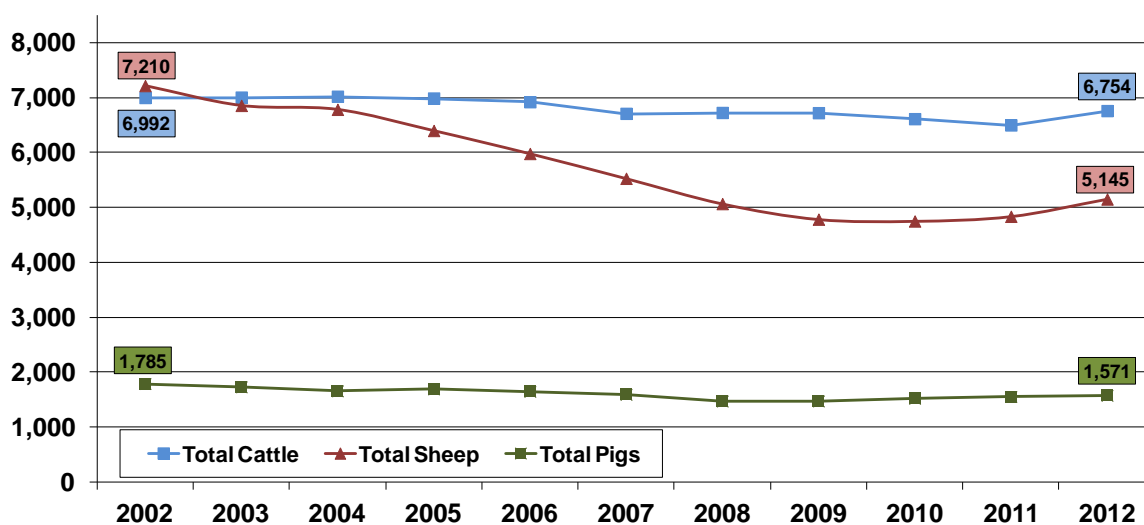
Farm Structures Data for Ireland		
Relevant Year	Statistic	Relevant Data
2010	Farm Holdings	139,860
2010	Average Farm Size	32.7 Hectares
2010	Family Farm Holders by Age	6.2% < 35; 51.4% > 55
2011 ⁽¹⁾	Employment in Agriculture, Forestry & Fishing (CSO)	87,100
¹ Persons employed in agriculture is based on the CSO's Quarterly National Household Survey (QNHS). It covers people who identified agriculture as their primary source of income in the week preceding the survey.		
Sources: Census of Agriculture 2010; CSO QNHS, Q2 2012		

F: Land Usage & Livestock Numbers

- The land area of Ireland is 6.9 million hectares; of which 4.6 million hectares is used for agriculture and a further 750,000 hectares for forestry (see also area under crops in Table, right).
- 82% of agricultural area is devoted to pasture, hay and grass silage (3.74 million hectares), 10% to rough grazing (0.45 million hectares) and 8% to crop production (0.37 million hectares).
- Average land prices in Ireland in 2011 were estimated to be €8,708 per acre. (Source: Farmers Journal Agricultural Land Price Report, 2011).

Area Under Certain Crops	
	000's Hectares
Cereals	297.4
<i>of which</i>	
Wheat	94.2
Oats	21.4
Barley	180.6
Potatoes	10.4
CSO Crops & Livestock Survey, June 2011 Final	

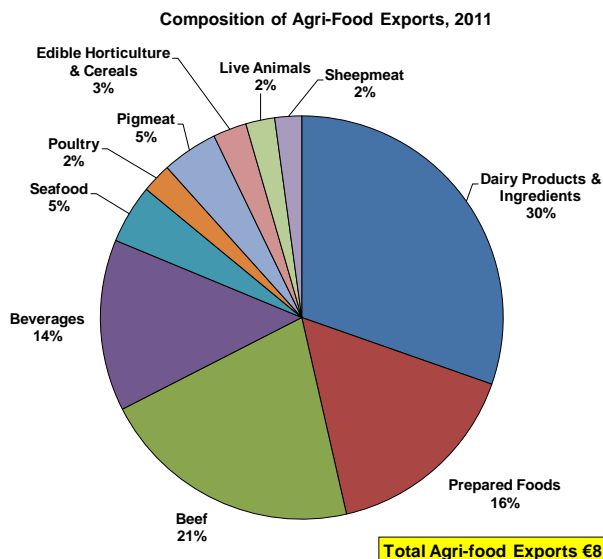
Livestock Numbers (000s), 2002-2012



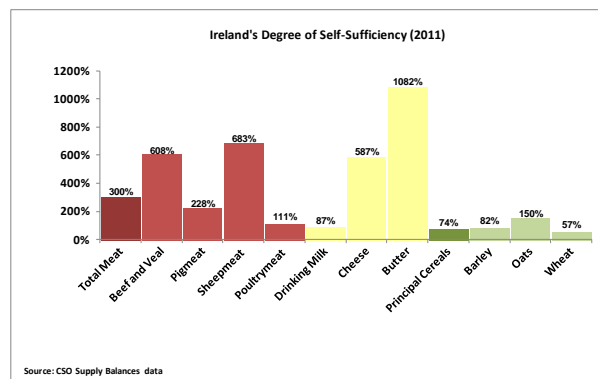
Source: CSO June Livestock Surveys (most recent - 2012 provisional)

G: Self-Sufficiency and Exports

Bord Bia estimated that in 2011 Ireland exported more than €8.8 billion in agri-sector exports, a result in large measure of Ireland's high level of self sufficiency in many products.

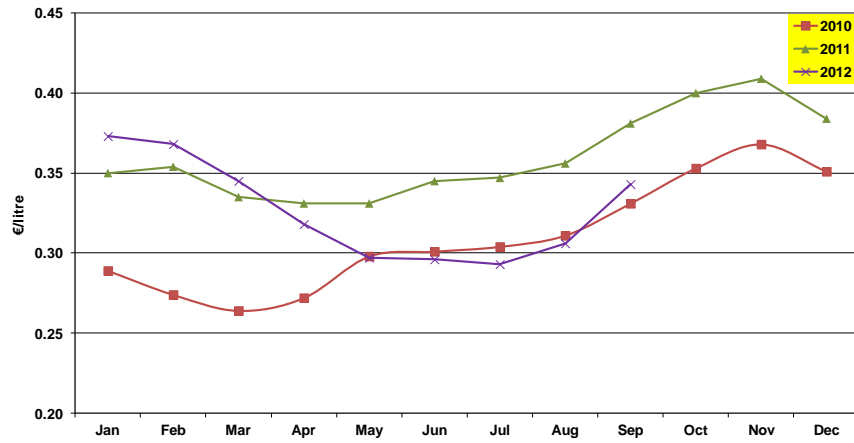


Source: Bord Bia

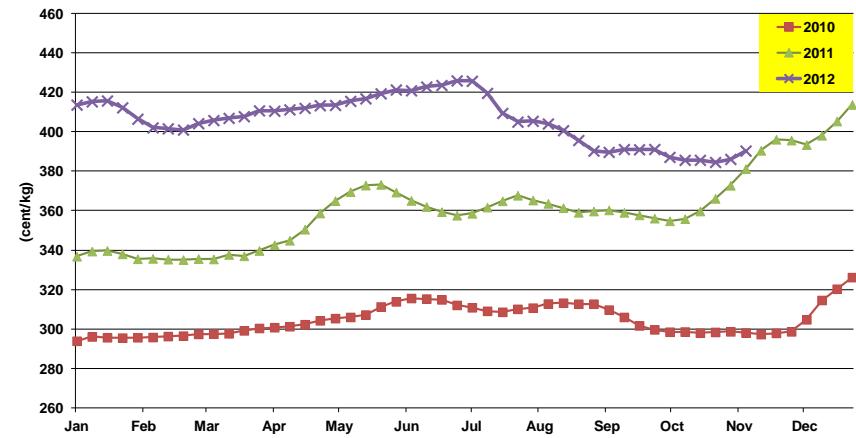


H: Commodity Price Trends

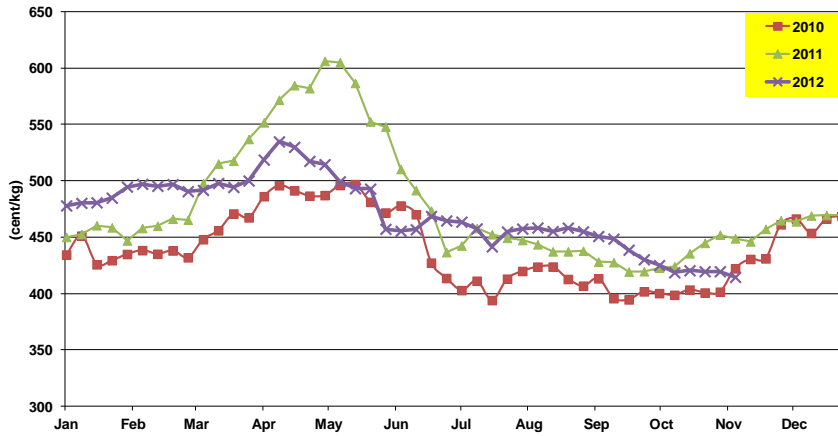
Manufacturing Milk Prices, 2010/11/12



Steer Prices (R4), 2010/11/12



Sheep Prices at Meat Export Premises, 2010/11/12



Grade E Pig Prices, 2010/11/12

