



Profile of Irish Agriculture & Food using CSO, EStat and Teagasc NFS economic data

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Overview

- **Structural Characteristics** of Irish Agriculture
 - CSO Farm Structures Survey
- Irish **agricultural land use**
 - CSO/ESat June Survey
- **Composition of Irish Agricultural Output** at Producer Prices
 - CSO Economic Accounts for Agriculture and Regional Accounts for Agriculture
- **Demography** of Irish **farmers and farm households**
 - Teagasc NFS data
- **Employment** in Irish **Agriculture & Food Manufacturing**
- **Export** orientation of Irish agriculture & food industry
- Concluding remarks

Structure of Farming in Ireland 2016

Total Number of
Farms **137,500**

Average Farm Size
32.4 hectares



Livestock
Numbers



Poultry
11.1m



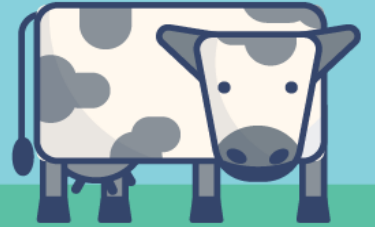
Pigs
1.6m



Sheep
5.1m



Cattle
7.2m



Total Agricultural Area
4,455,800 hectares

Land Usage:



Grassland
4,104,300
hectares



Other
62,100
hectares



Cereals
280,400
hectares



Potatoes
9,000
hectares

Farm Labour

Total Number of Family Farms **137,100**

Male Holder
121,100
88%

Female Holder
16,000
12%

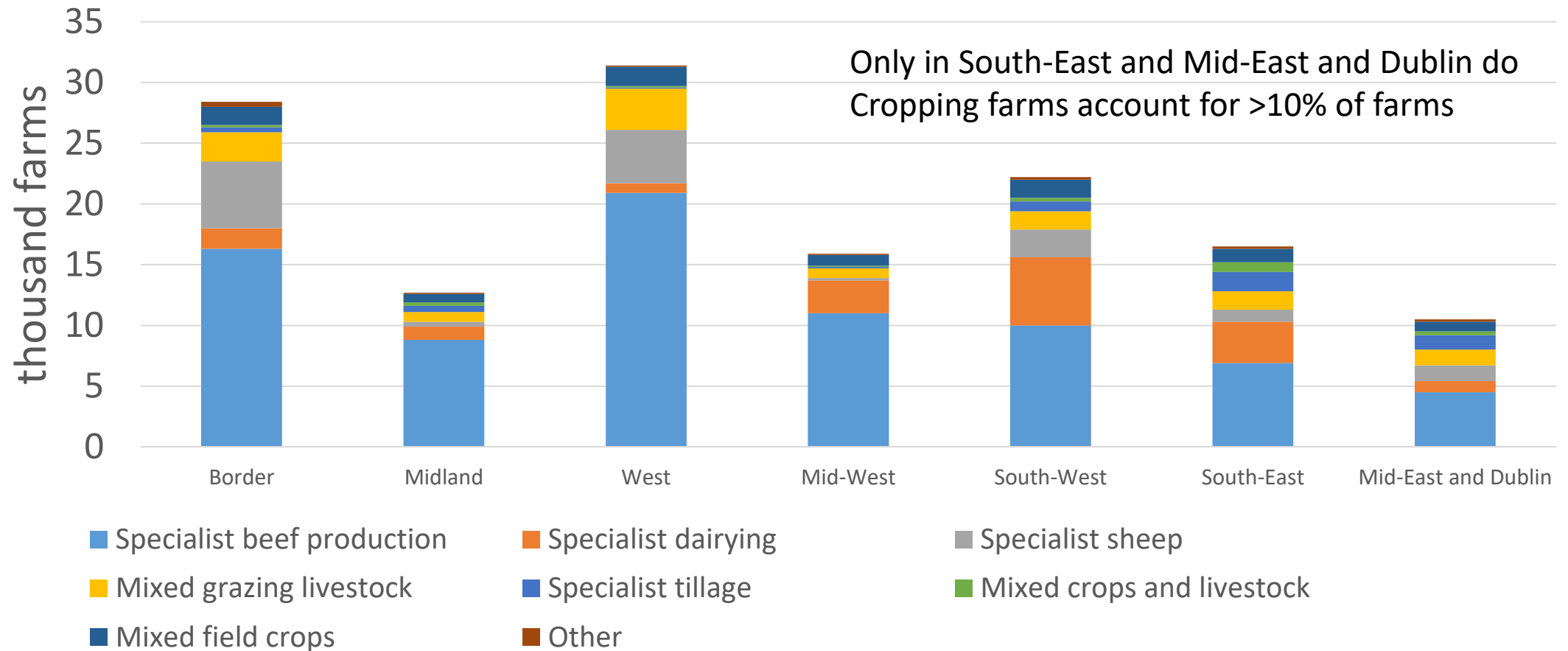


Age of Farmholder

Under 35
7,400
5%

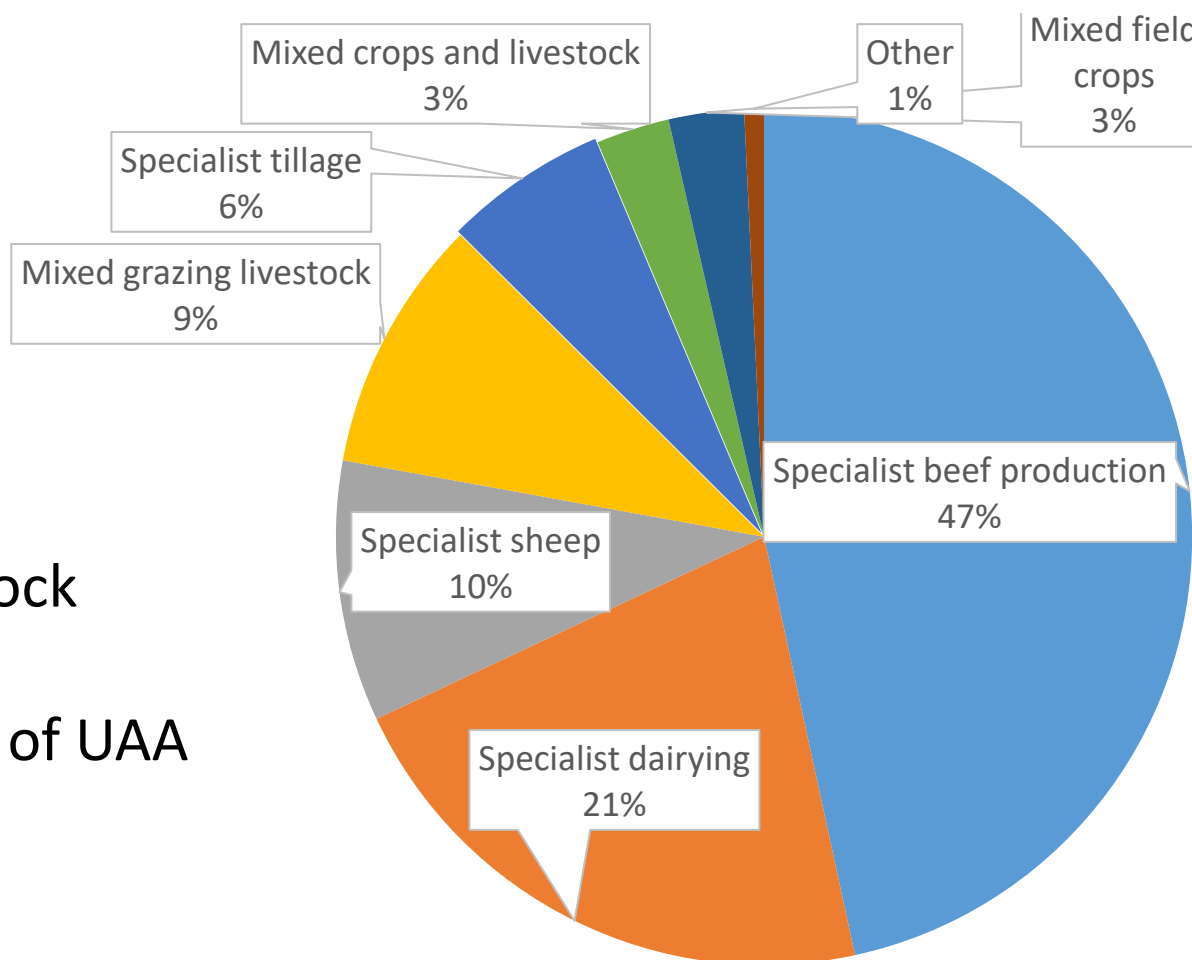
65 and over
41,200
30%

Farm Types by Region (2016)



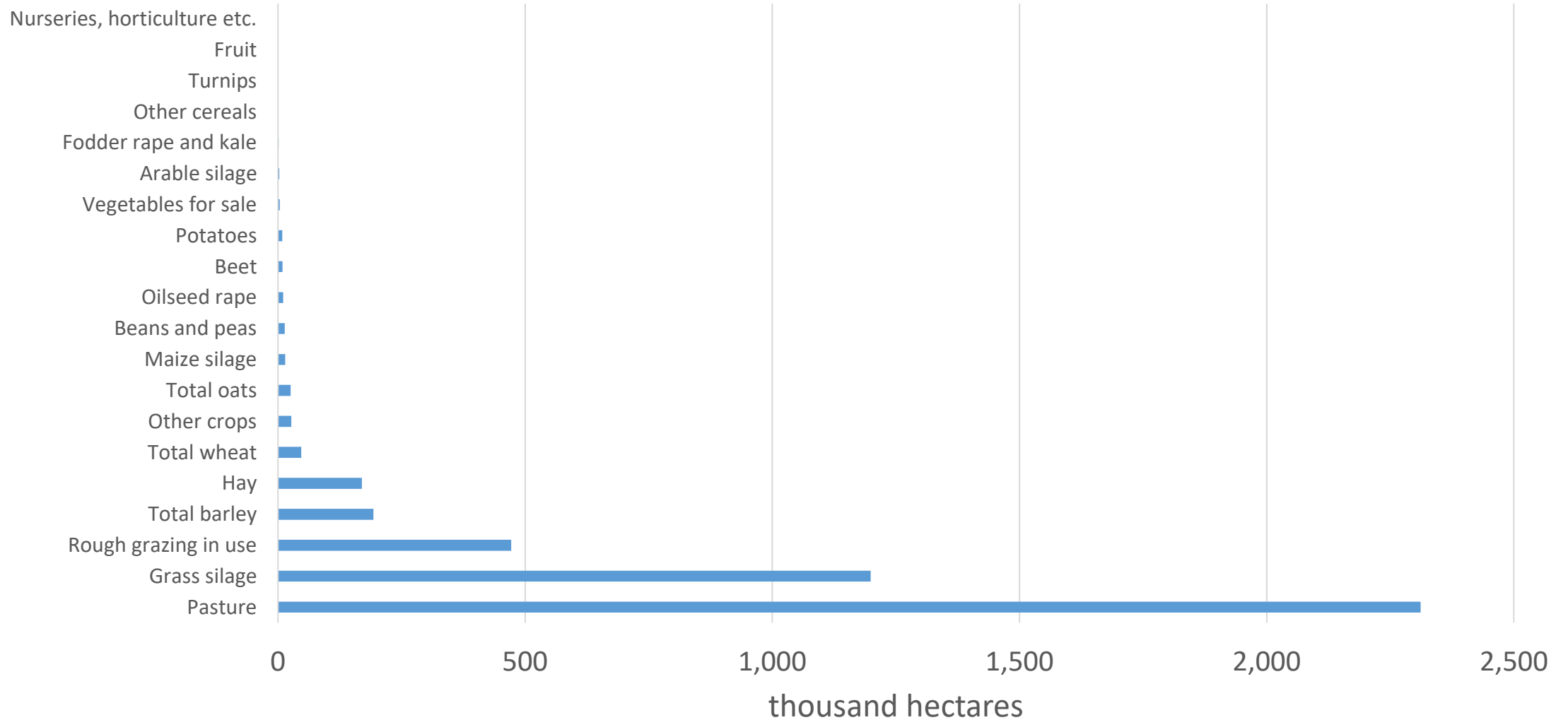
Source: CSO Farm Structures Survey

Agricultural Land Use by Farm Type (2016)

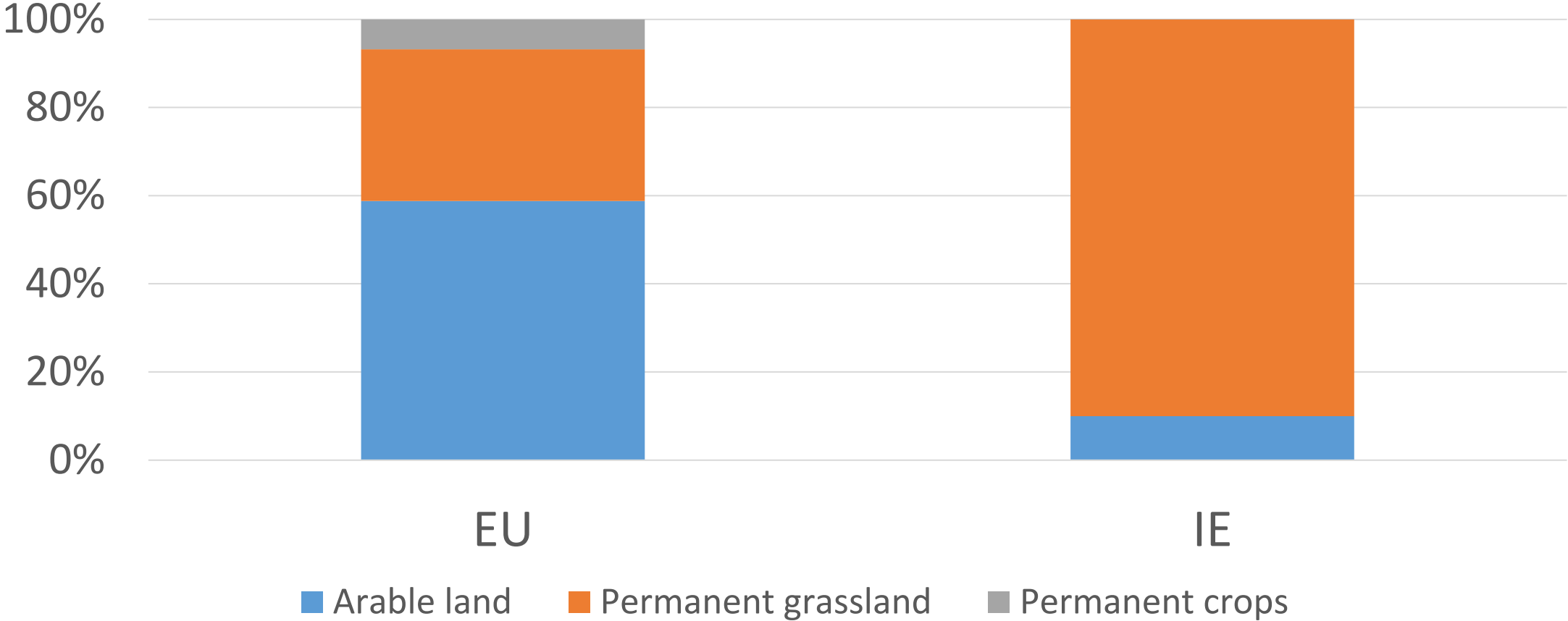


Ruminant Livestock farming systems account for 87% of UAA

Irish agricultural land use 2020

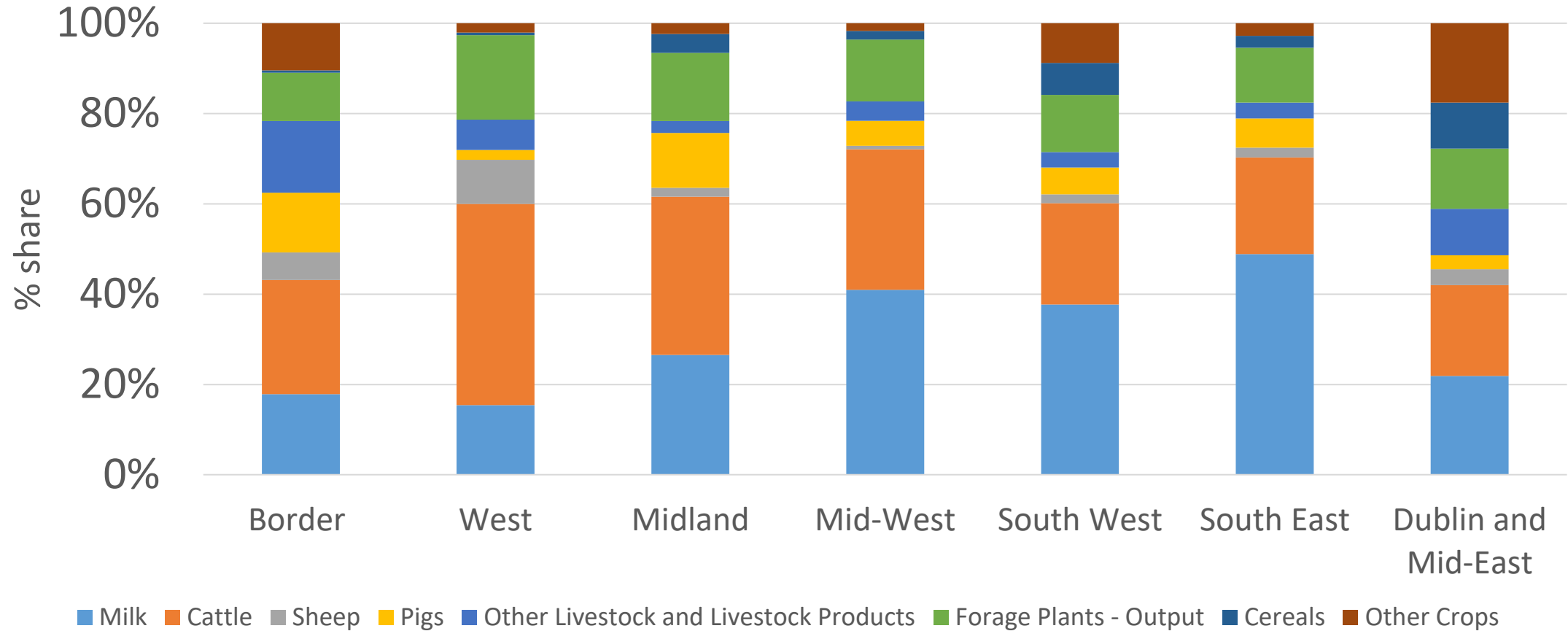


Comparing Irish and EU agricultural land use: Share of UAA (agricultural land area)



Source: ESTAT apro_acs (2018)

Agricultural Goods Output at Producer Prices



Regional Accounts for Agriculture 2019

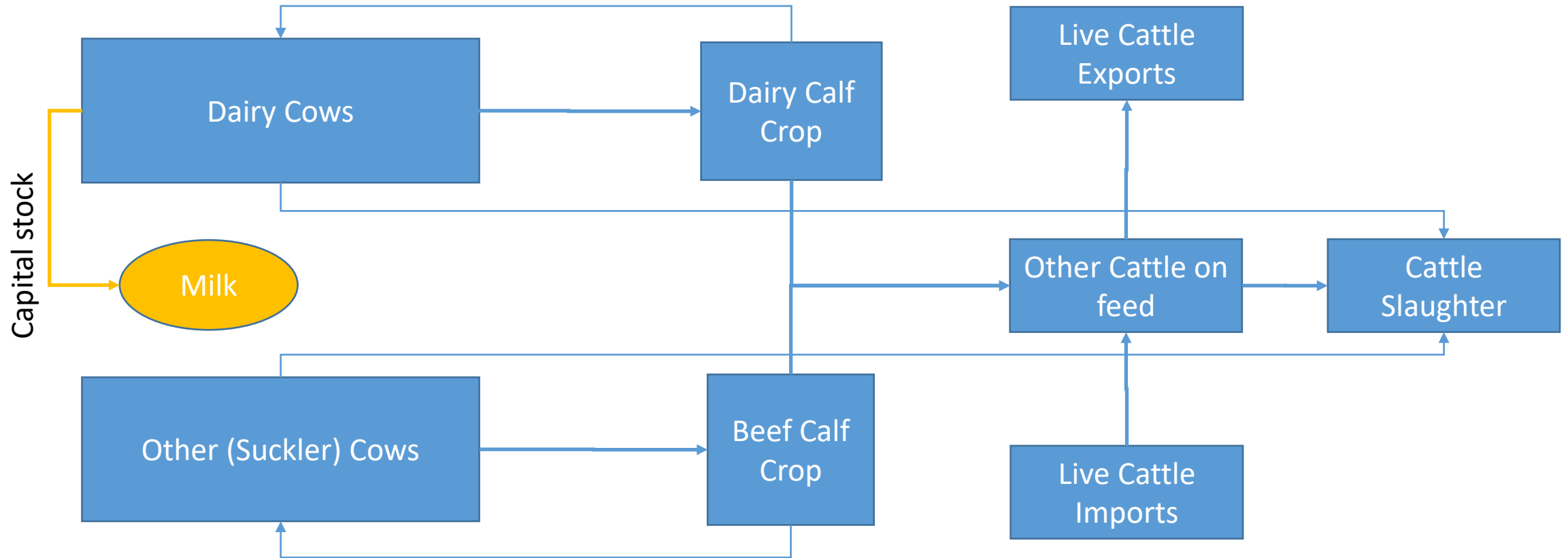
Output, Input and Income



Source: Adapted from CSO Regional Accounts for Agriculture

Ireland Bovines: flow chart

Breeding inventory is the capital stock with flows of animals (and milk) outputs



Dairy farmers and Suckler farmers

Cattle Other (Finishing) farmers

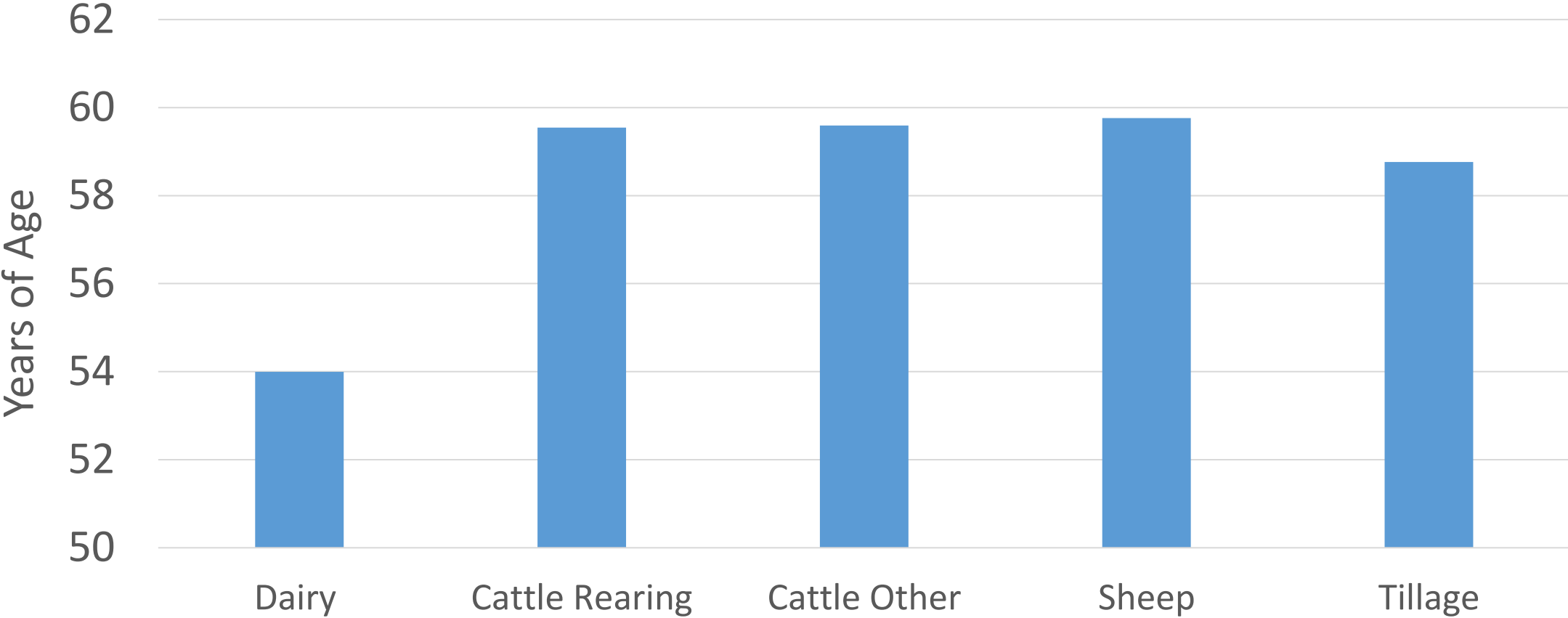
Dairy cows on 18k farms/ Other cows on 73k farms

Other cattle (> 2 years) on 66k farms

Socio-demographic characteristics of farmers and farm households

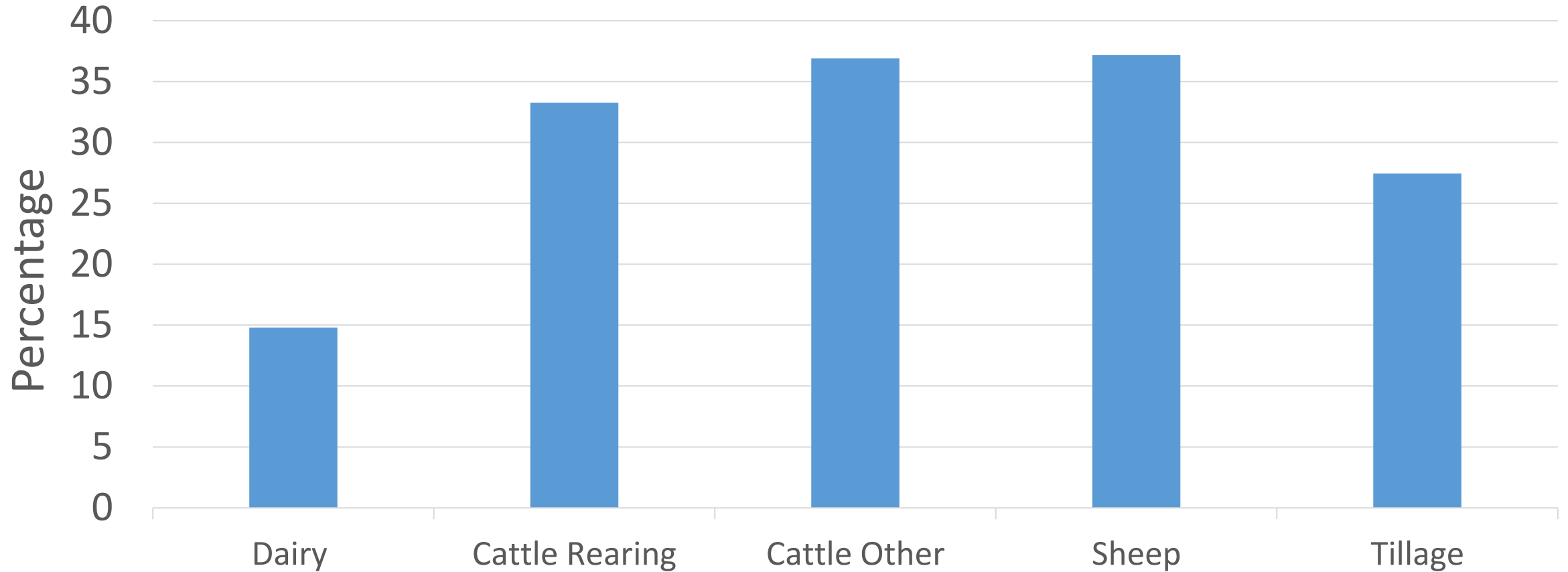
- Based on Teagasc NFS:
 - rich micro-economic dataset
 - Irish component of the EU Farm Accountancy Data Network (FADN)
- Statistically representative annual sample of Irish farms
- Teagasc collects and publishes data on sustainability of Irish farming
 - Metrics across three dimension of sustainability economic, environmental and social
 - developing in tandem with environmental and economic research findings
- [Teagasc NFS Reports](#)
- [Teagasc Sustainability Reports](#)
- [Flint FP7 Project](#) and ongoing [MEF4CAP H2020 Project](#)

Average age of Farm Operator 2019



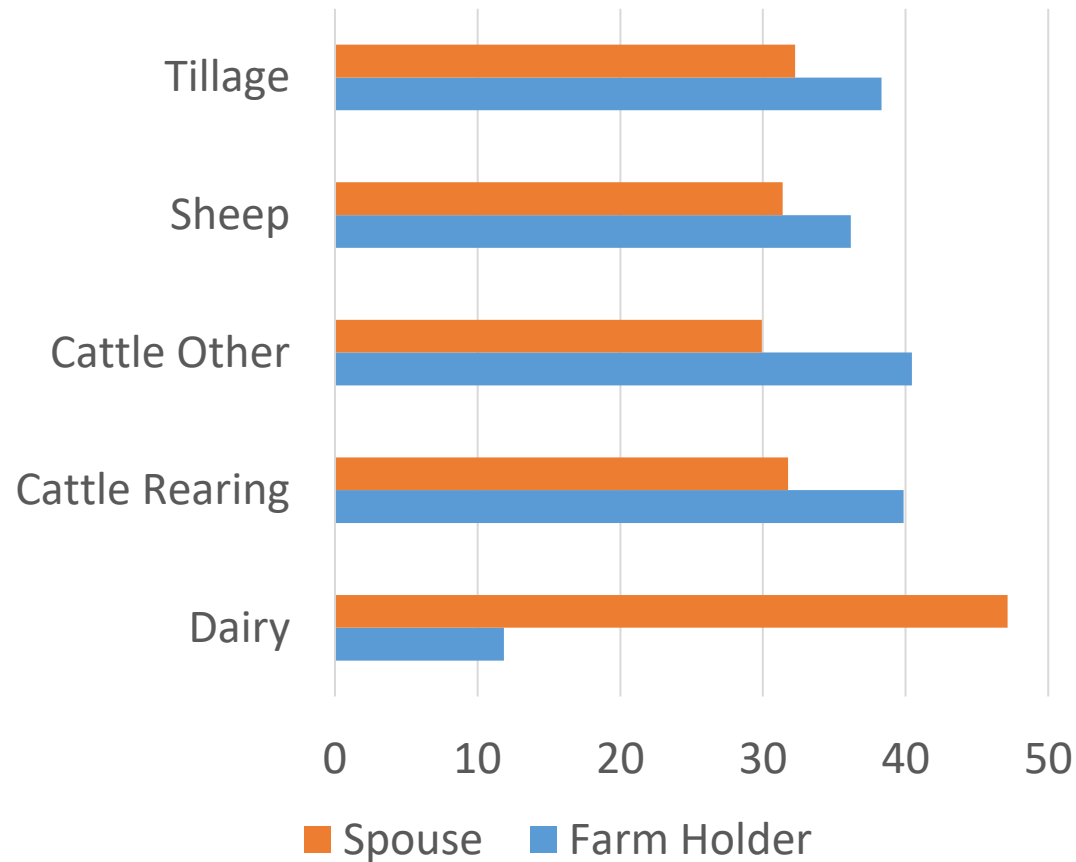
Source: Teagasc National Farm Survey

Percentage of farm operators who are pensioners 2019



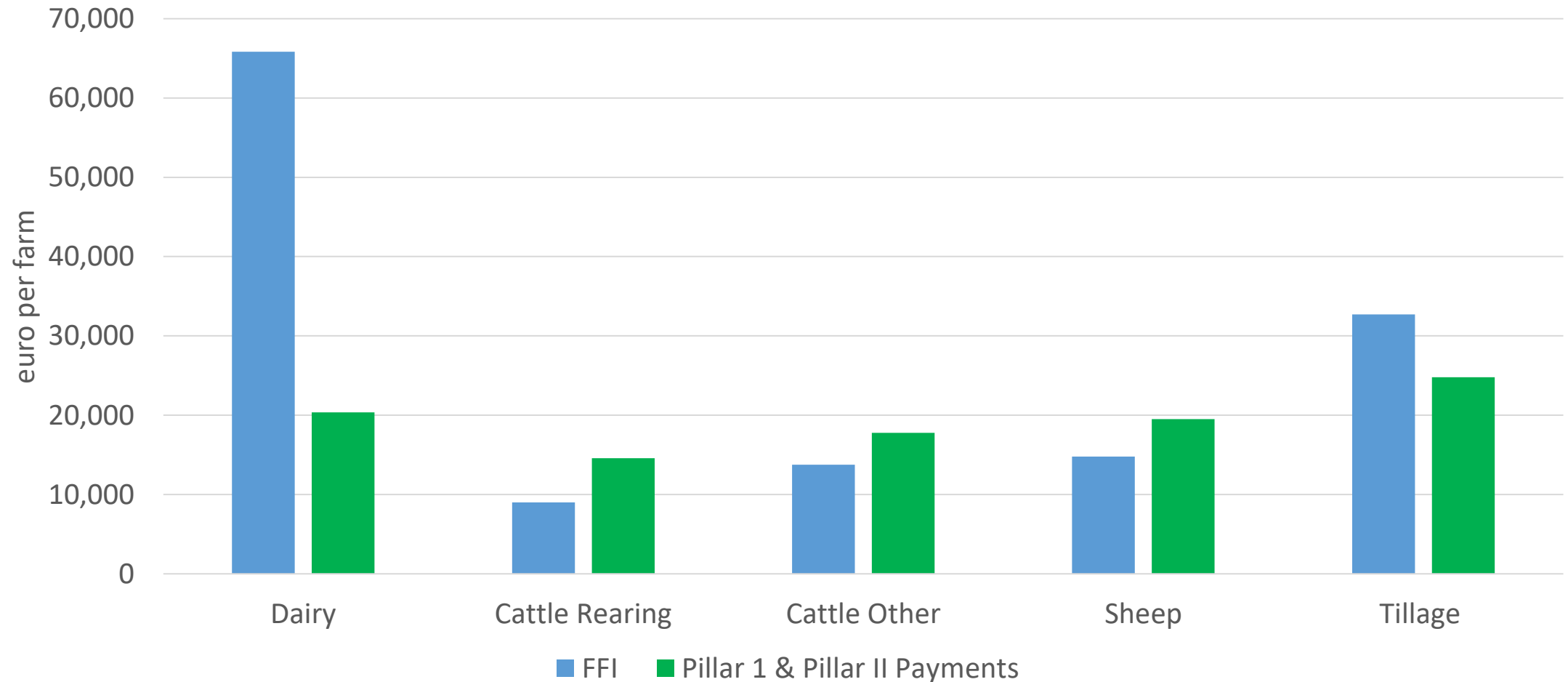
Source: Teagasc National Farm Survey

Prevalence of Off Farm Work 2019



- Drystock and Tillage farm operators
 - more likely to work off farm
- Dairy farm operators
 - Relatively few work off farm
- Dairy farm spouse
 - most likely to work off farm

Average Family Farm Income Levels per Farm 2019



Source: Teagasc NFS

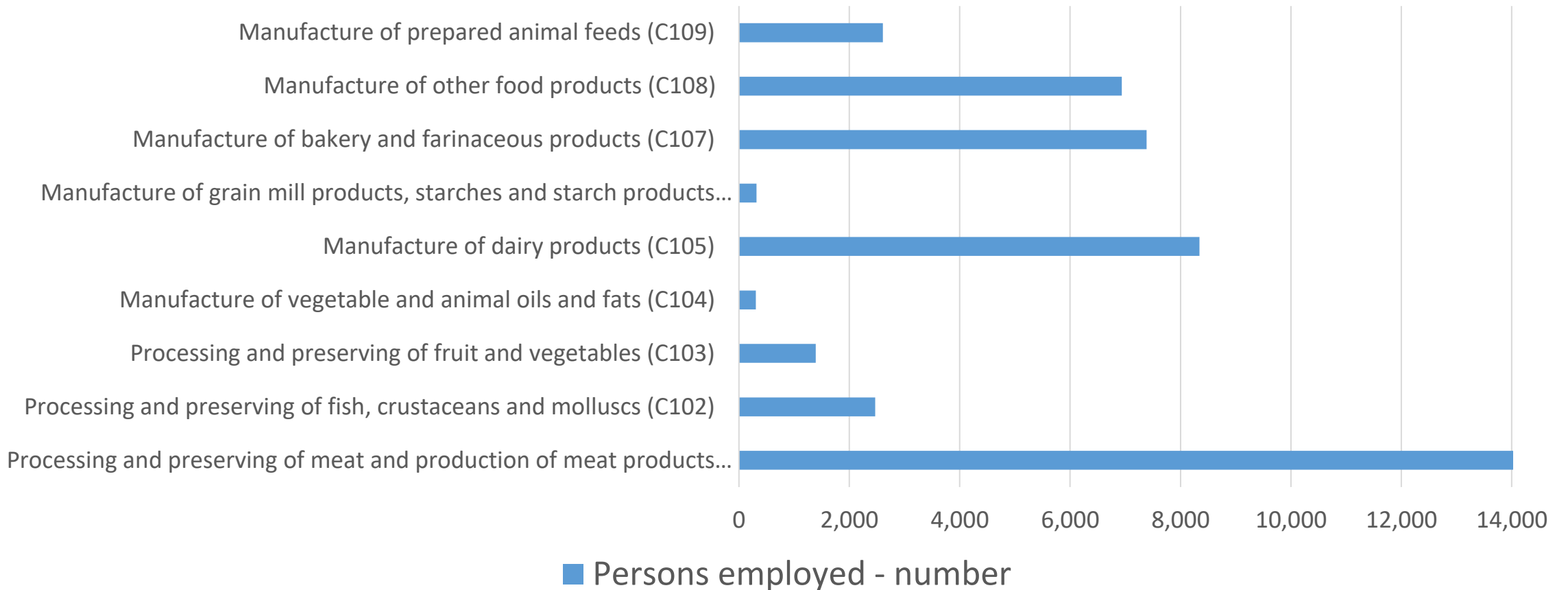
Employment in Agriculture: Two sources QNHS and FSS

- Q4 2019 QNHS
 - Employment in agriculture, forestry and fishing
 - **106.9 k**
 - **4.5%** of total employment (across all NACE sectors)
- 2016 Farm Structures Survey
 - Persons working in agriculture
 - 265.4 k or 157.5 Annual Work Units
 - Vast majority of labour provided by farm owner and farm family
 - Reflects the Irish family farm model
 - Regular non-family labour in 2016
 - **18.5k** person (10k AWU)
 - 60% of regular non-family employment was on cattle and dairy farms

Food industry

- Detailed Food industry data from ESTAT Structural Business Statistics
 - employment levels, output, value added, investment
 - Disaggregates Irish food and beverage manufacturing into component parts
- Very limited regional food industry data are published
 - but IGEES analysis provide some insights on regional concentrations

Irish Food Manufacturing Employment - 2017



Source: EStat sbs_na_ind_r2 (Structural Business Statistics)

National and Regional Employment: Food

Department of Finance | UK EU Exit – An Exposure Analysis Of Sectors Of The Irish Economy

- Food Sector (C10) in 2017
 - 22.5% of Manufacturing Employment
 - Inclusion of Beverage brings it close to 25%
- Regional concentration of food sector?
 - No official published data (EStat/CSO)
- IGEES study on Brexit exposures (2016)
 - used unpublished CSO data
- Broad regional spread of food sector
 - almost 80% of employment outside Dublin

Table 6. Persons Employed in Each Region as a Percentage of Total Employment by Sector⁴⁸

NACE Sector	Dublin	Midlands	South-East	South-West	West Region	Border	Outside-Dublin
Food & Beverage (NACE 10-12)*	22	27	16	14	5	17	78
Traditional Manufacturing (NACE 13-17)*	32	26	9	14	5	14	69
Materials Manufacturing (NACE 22 to 25)	14	32	15	14	9	16	86
Pharmachem (NACE 20, 21)*	30	18	12	26	7	6	70
Electrical Equipment (NACE 27)	9	34	10	-	8	38	91

Source: CSO Census of Industrial Production 2012 data. Department of Finance Analysis.

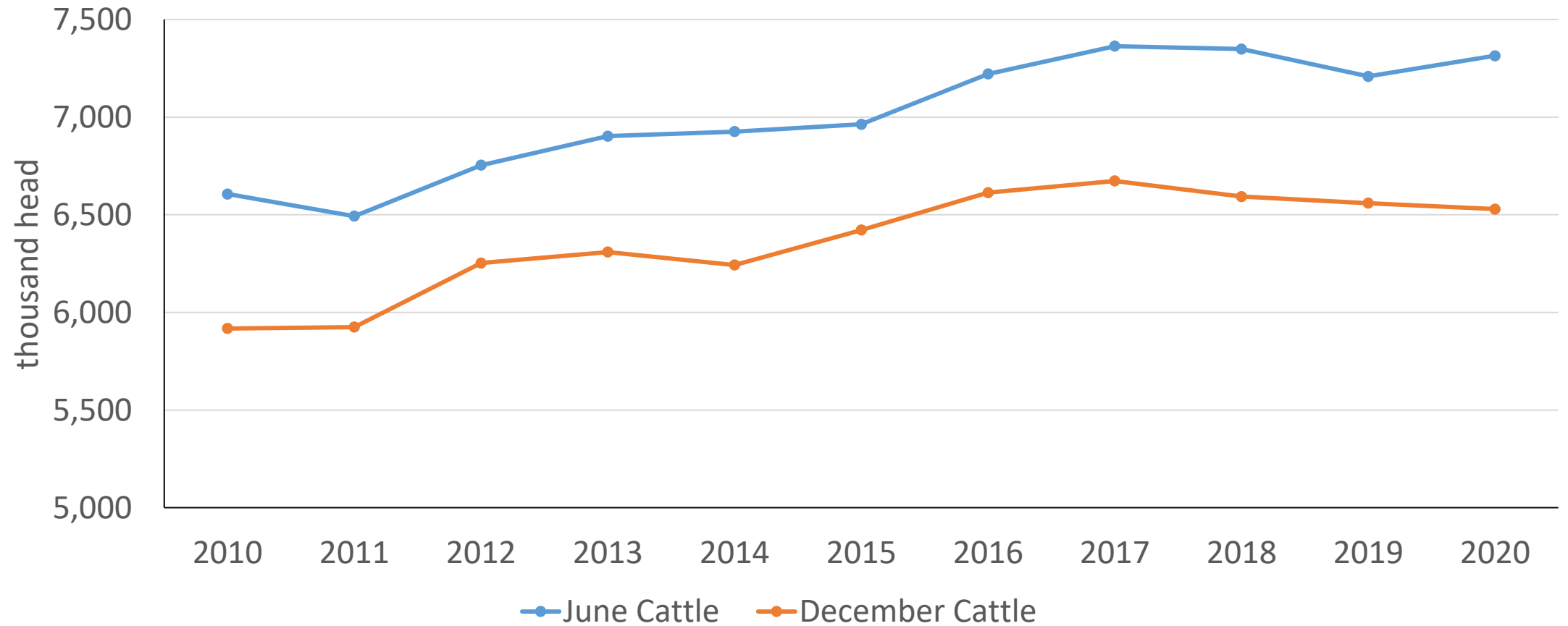
Export Orientation of Agri-Food Sector

- CSO:
 - Supply and Use Balance sheets (limited number of agricultural sectors)
- JRC-IPTS
 - richer set of S&U balance sheets for MS -
https://datam.jrc.ec.europa.eu/datam/mashup/PROD_TRADE_USE/
- Irish agri-food trade is atypical
 - importance of exports in meat and dairy commodities use
 - net importer for most (but not all) Cereals and Oilseeds
 - also a net importer of Fruits and Vegetables
- Why is Ireland such a large exporter of certain commodities?

Concluding comments

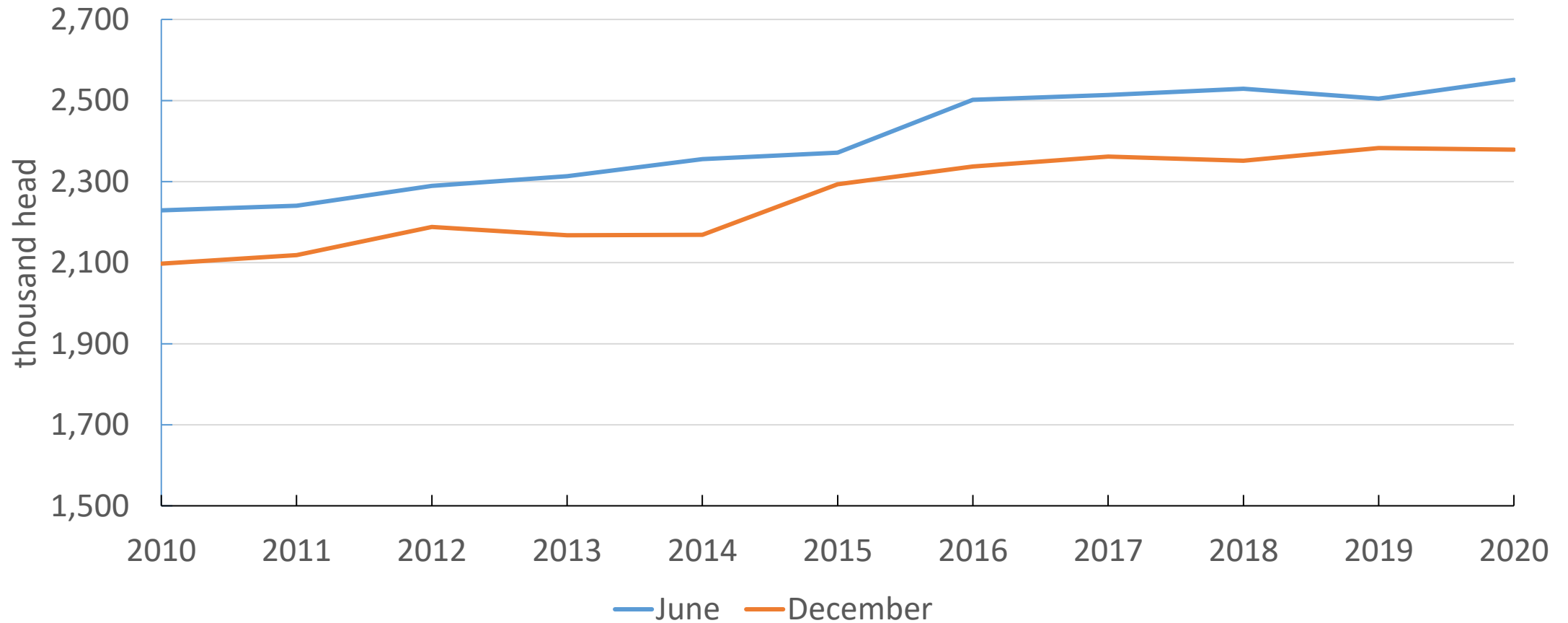
- Irish agriculture land use and the products farmers' produce are a function of
 - Supply side (agronomic realities – land quality, climate, human and financial capital)
 - Demand side (food needs of Irish, European and increasingly global society)
- Externalities of agricultural production in Ireland (and elsewhere)
 - a market failure – a failure of a market to exist
- Evolving societal demands for something different from agriculture & food
 - But need to be reflected in markets so that farmers in Ireland and elsewhere respond
- Current market and policy signals don't reflect externalities
 - We are telling farmers to **prioritise producing** food
- Therefore we shouldn't be surprised that this what they do

Total Cattle Numbers – Ireland 2010-2020



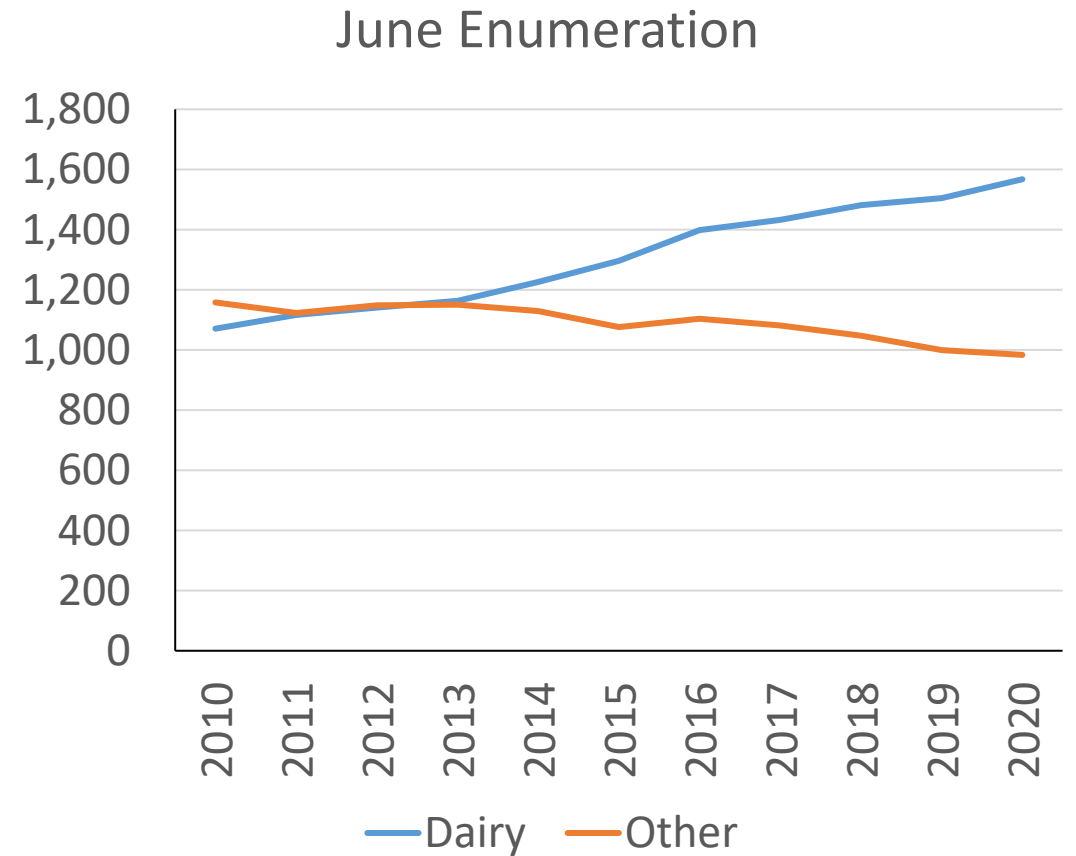
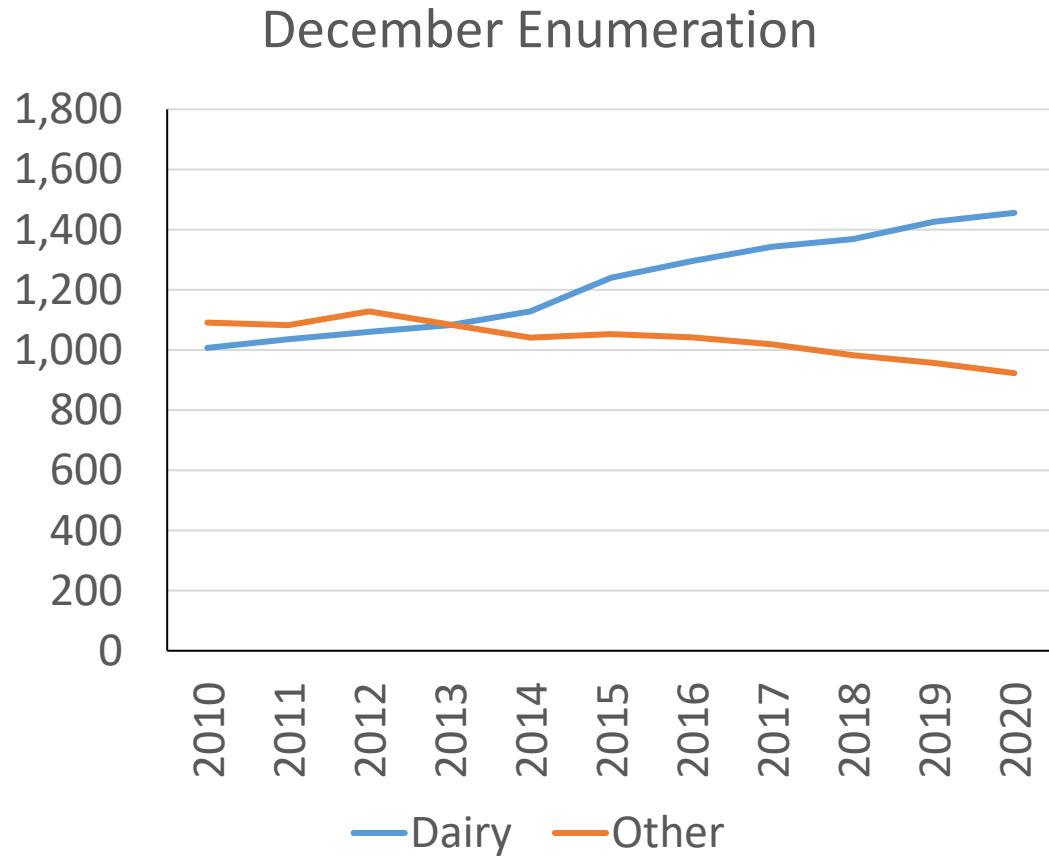
Source: CSO AAA06, AAA08 & AAA10

Total Cow Numbers – Ireland 2010-2020



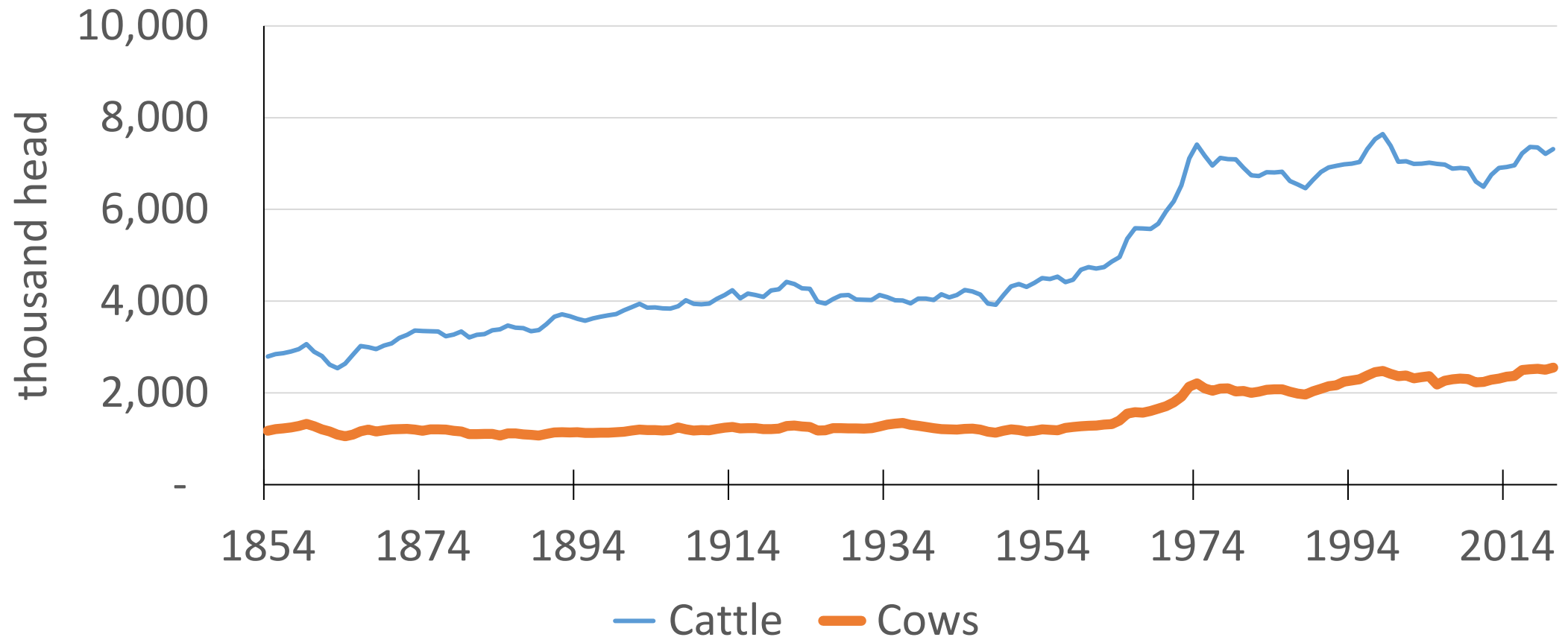
Source: CSO AAA06, AAA08 & AAA10

Cow Inventories – December and June



Source: CSO AAA06, AAA08 & AAA10

Historical Irish Cattle & Cow inventories (June 1854-2020)



* Data on other agricultural activities available from CSO "Farming Since the Famine 1847 - 1996" and CSO databases. Cows = sum of Dairy and Other (beef/suckler) Cows