



AGRICULTURE AND FOOD DEVELOPMENT AUTHORITY

The Irish Agriculture and Food Development Authority

Teagasc Naonal F^oarm Survey

Preliminary Results

2019

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Athenry, Co. Galway.



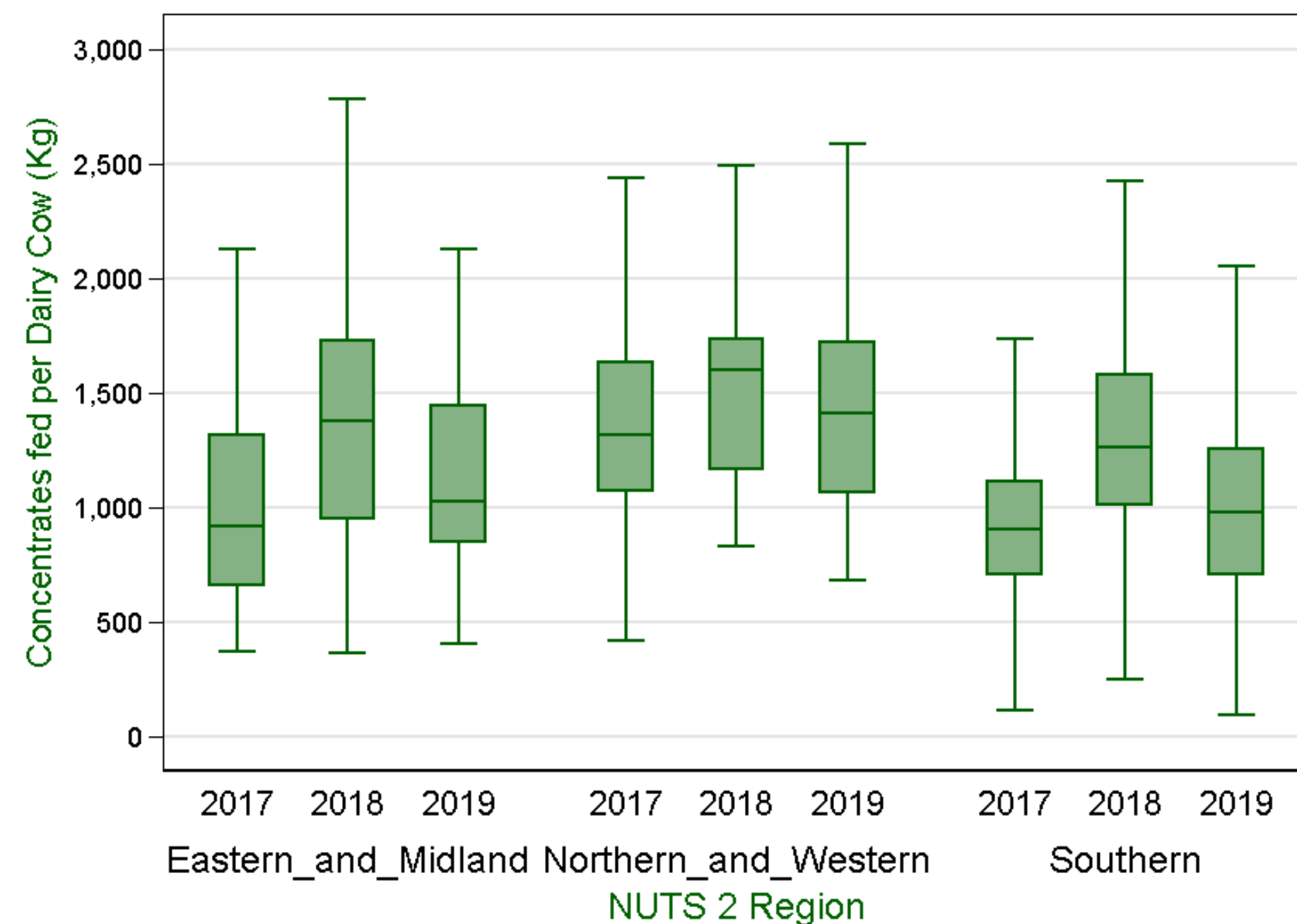
Outline

1. 2019 Summary & Family Farm Income Definition
2. Overview of Farm Income Results 2019
 - Farm Systems Analysis
 - Income Distribution
 - Regional Results
3. Receipt of Direct Payments 2019
4. Investment & Borrowings
5. Farm Demographics
6. Farm Viability
7. Conclusion

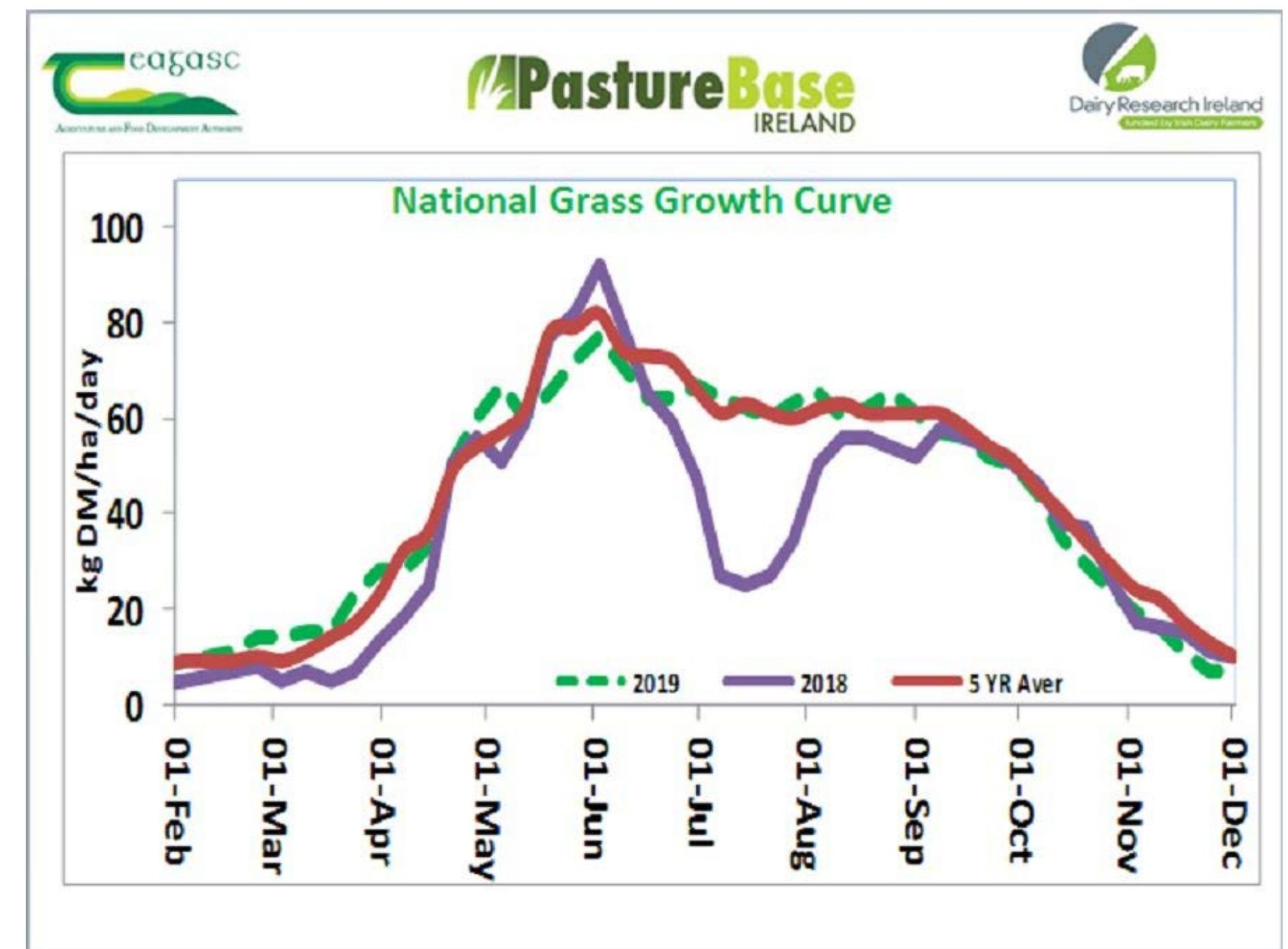
Family Farm Income Definition

Calculated by deducting all farm costs from total gross output. Family labour is not included as a cost so FFI is the return to family labour, management and investment.

Avg Concentrate usage on Dairy Farms by NUTS II Region 2017 - 2019



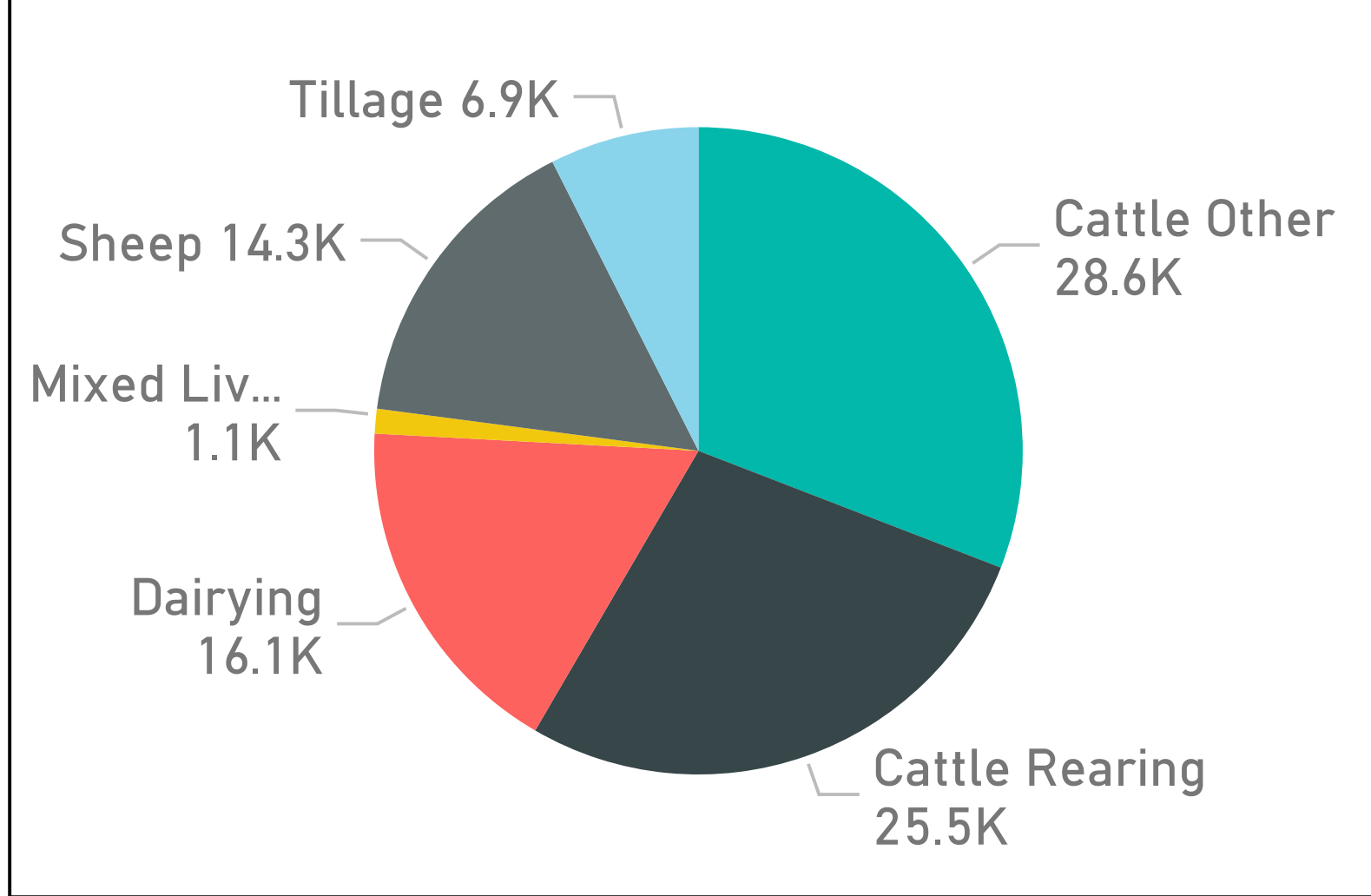
Growth Curve from Pasture Base Ireland 2019



Interpreting Boxplots

The green shaded boxes are representative of between 25% and 75% of the population. The line within the box represents the median (middle) data point, i.e. half of all farms lie below this with half above. The tails at either end correspond to the minimum and maximum data points with extreme outliers removed.

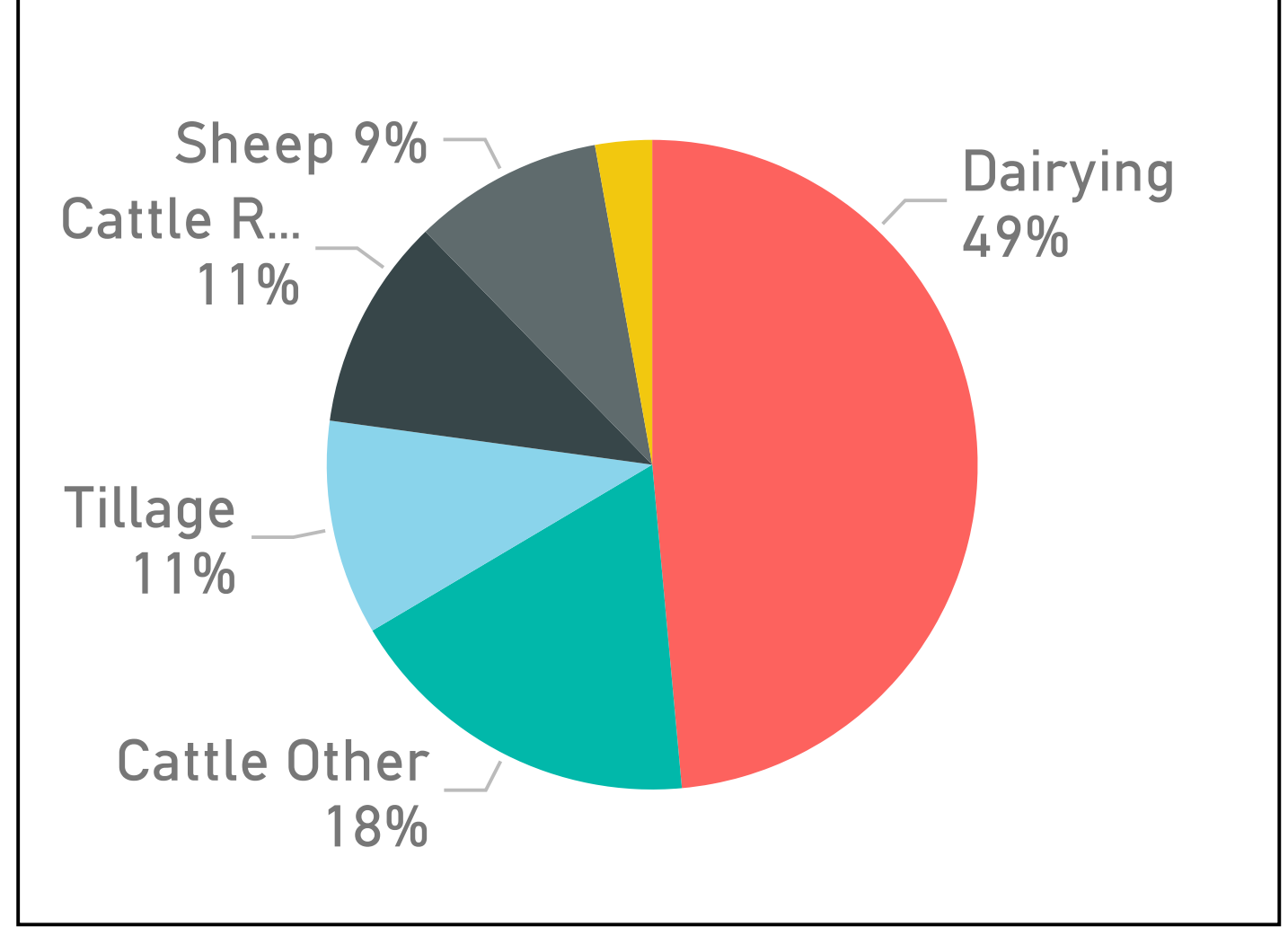
Farm Population 2019



Family Farm Income by System 2019

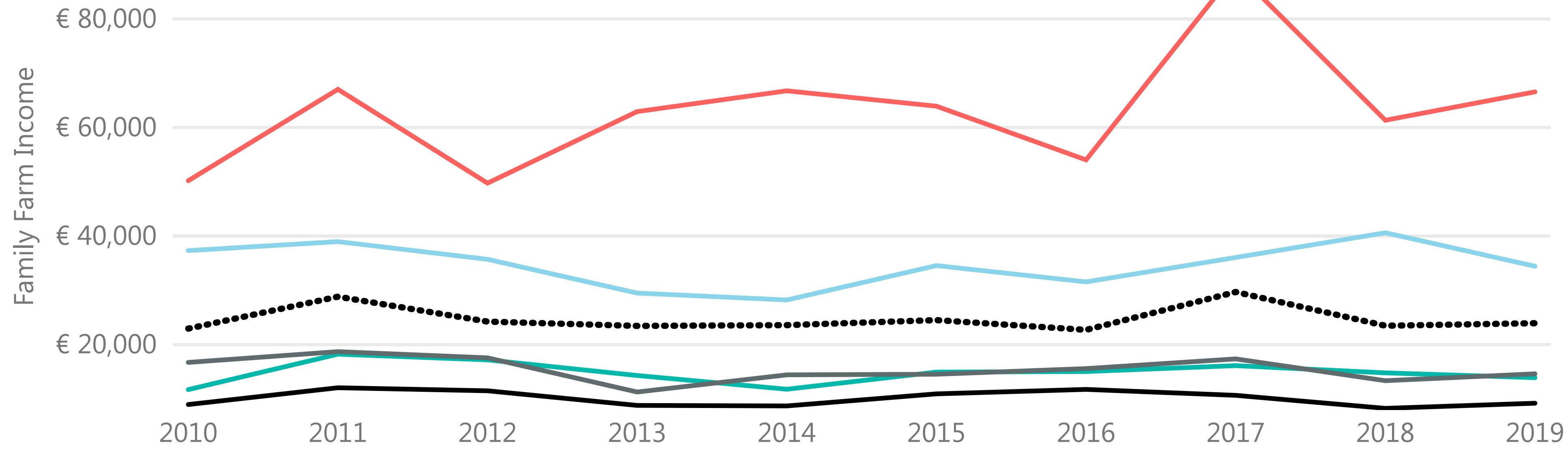
Farm System	Family Farm Income
ALL Systems	€ 23,934
Cattle Other	€ 13,893
Cattle Rearing	€ 9,188
Dairying	€ 66,570
Mixed Livestock	€ 54,765
Sheep	€ 14,604
Tillage	€ 34,437

Aggregated FFI % 2019



Family Farm Income 2010 - 2019 € per farm

Farm System ● ALL Systems ● Cattle Other ● Cattle Rearing ● Dairying ● Sheep ● Tillage

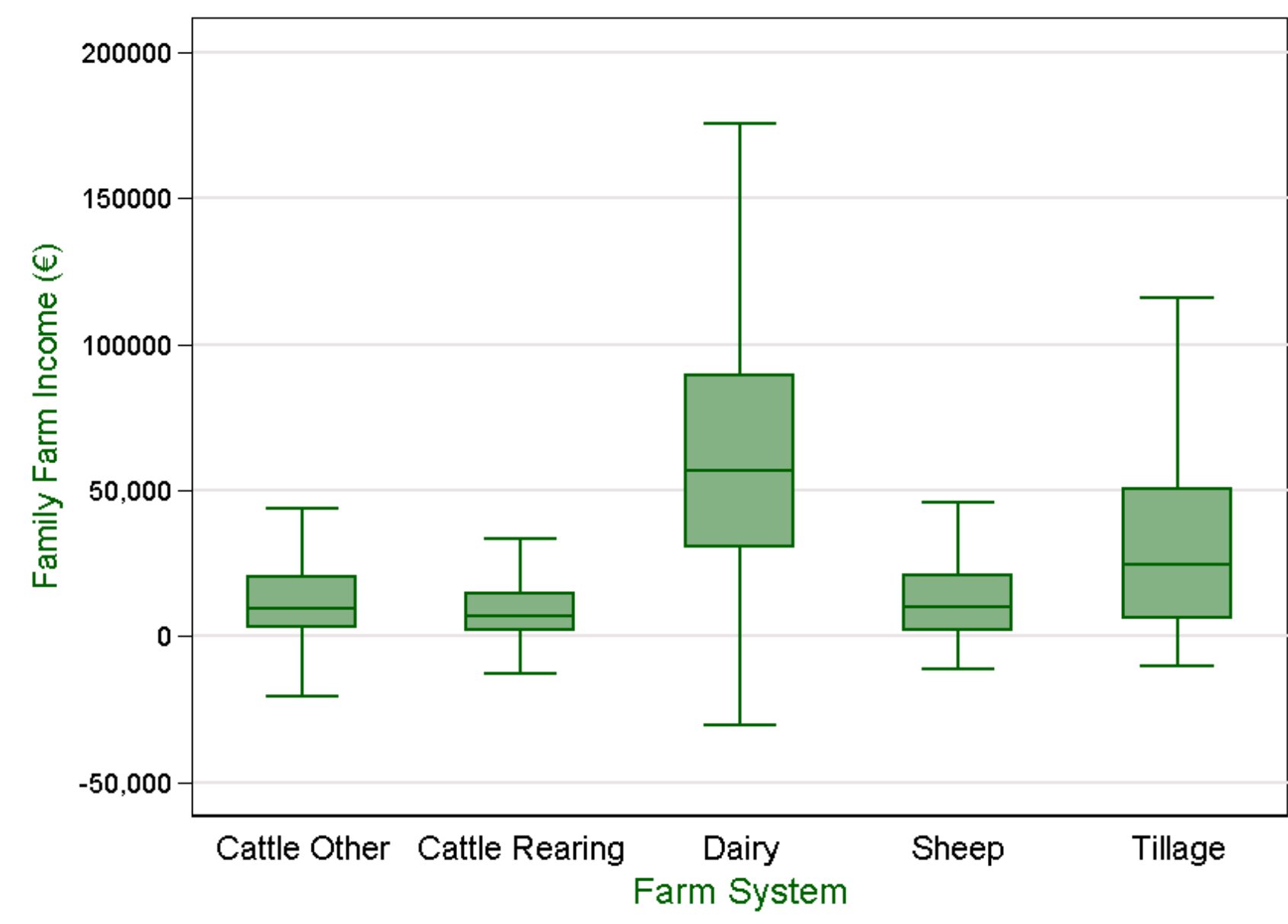


Average Family Farm Income 2019

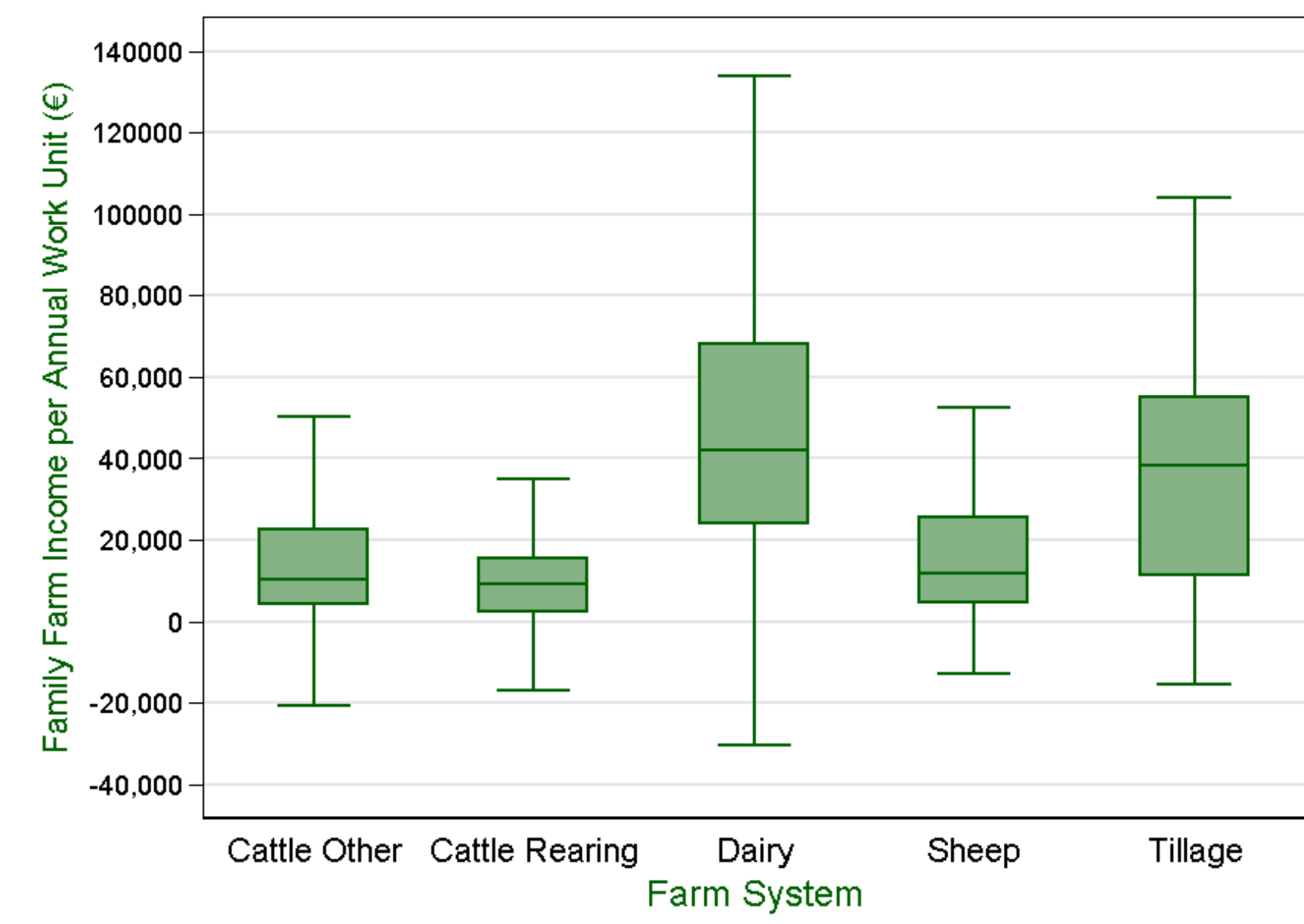
€ 23,934



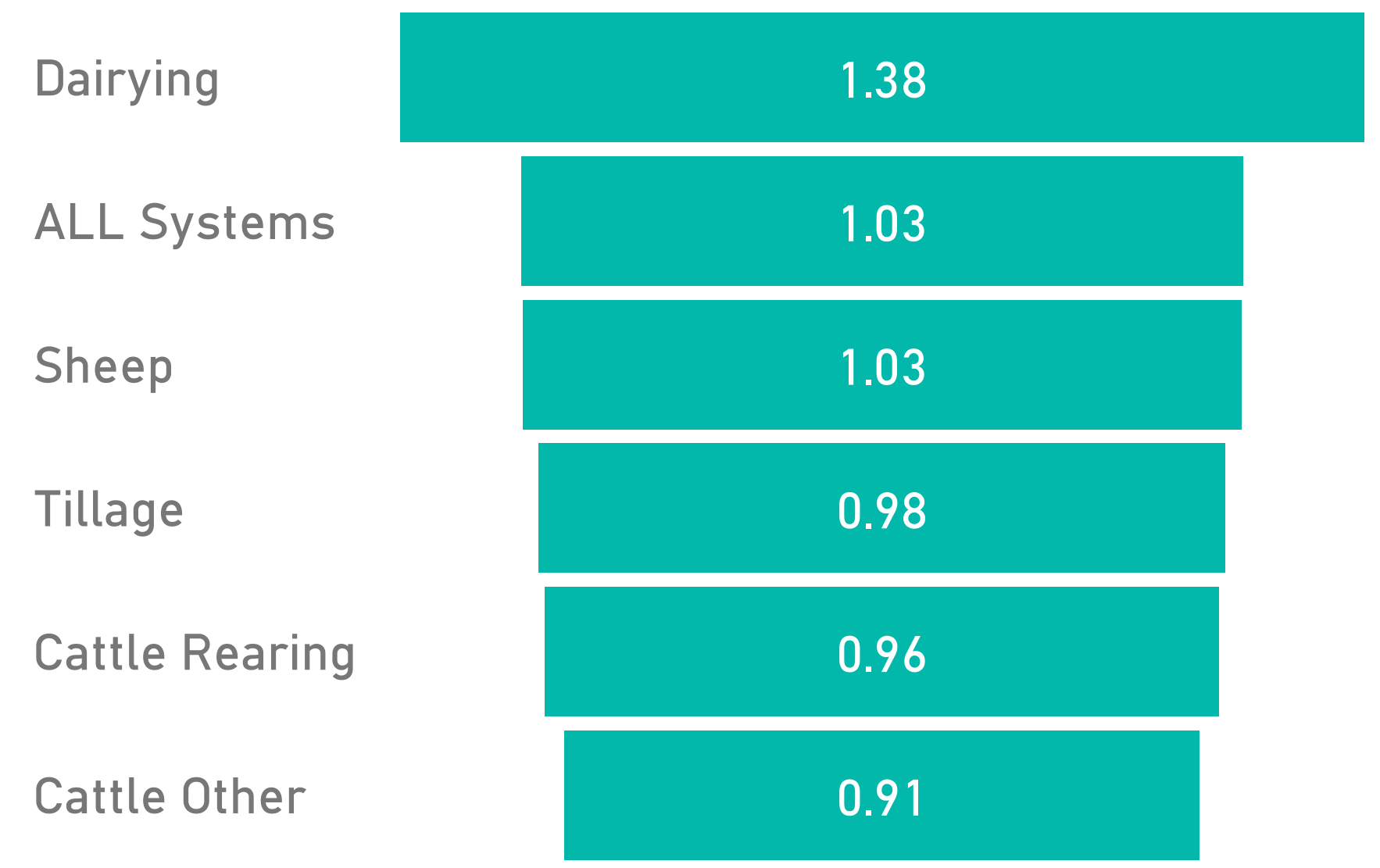
FFI Distribution by Farm System 2019



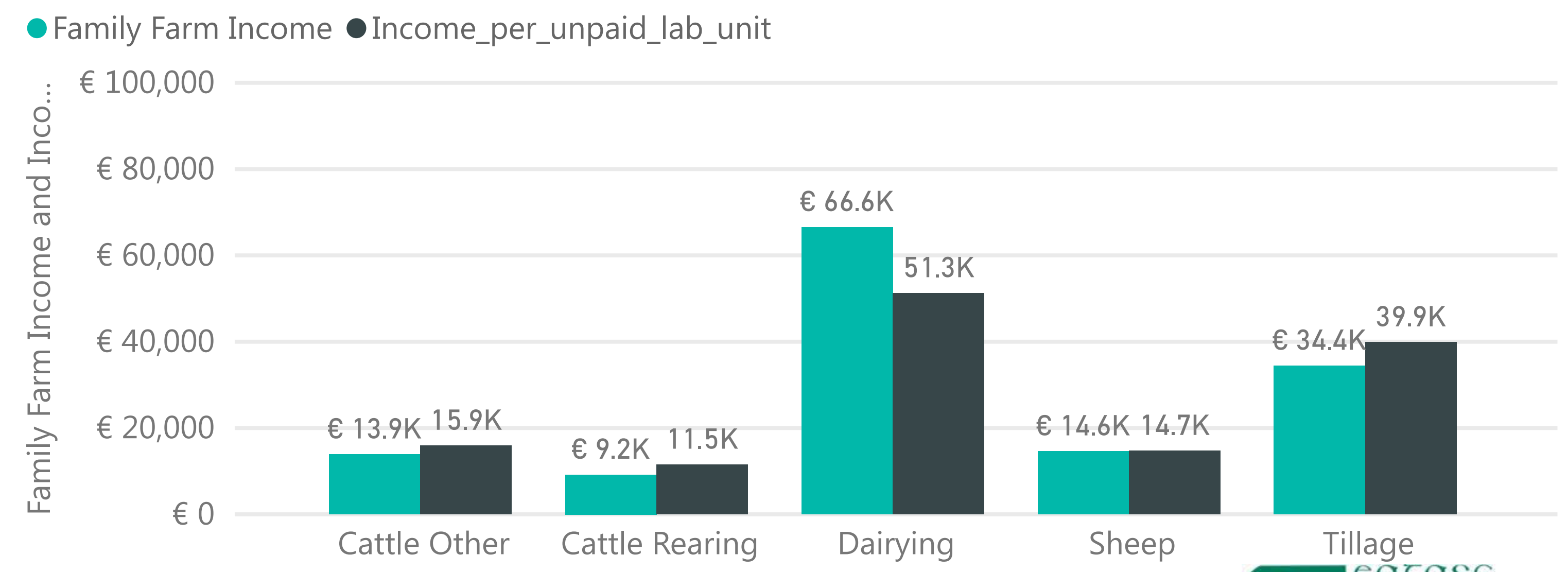
FFI per AWU by Farm System 2019



Unpaid Labour units per farm



FFI & FFI per AWU 2019 € per farm



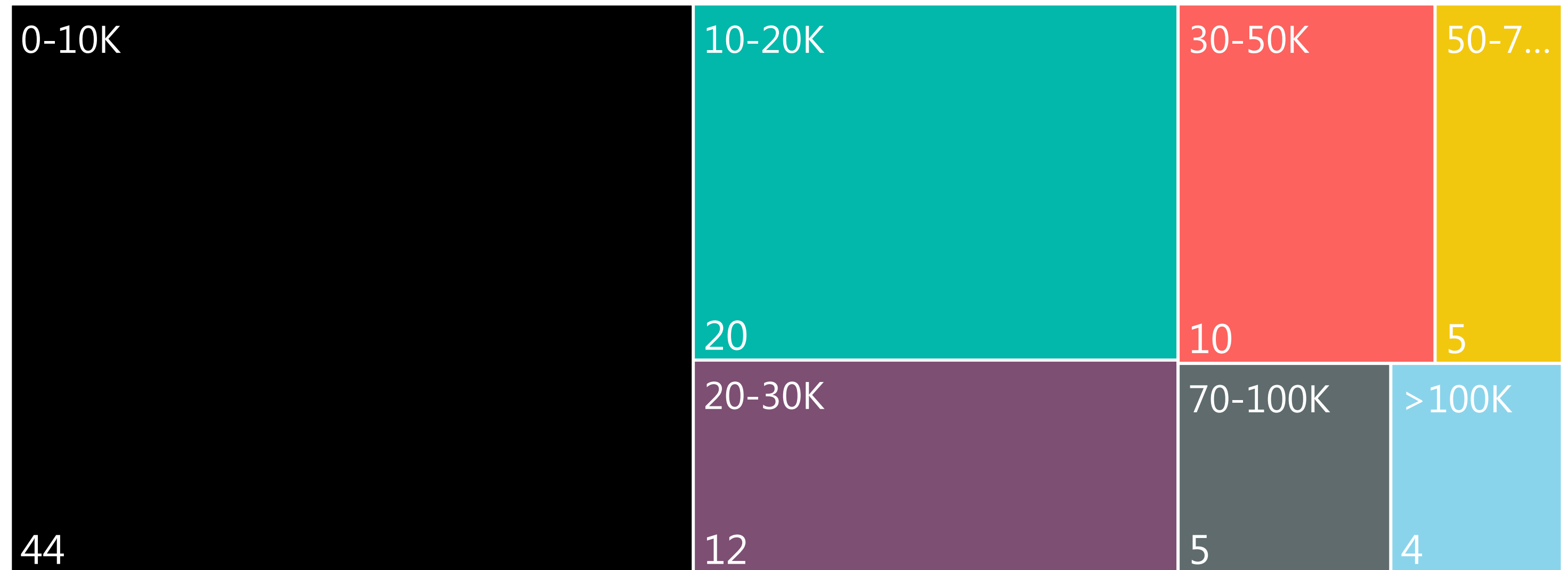
Family Farm Income Distribution 2019

44% earn less than €10,000

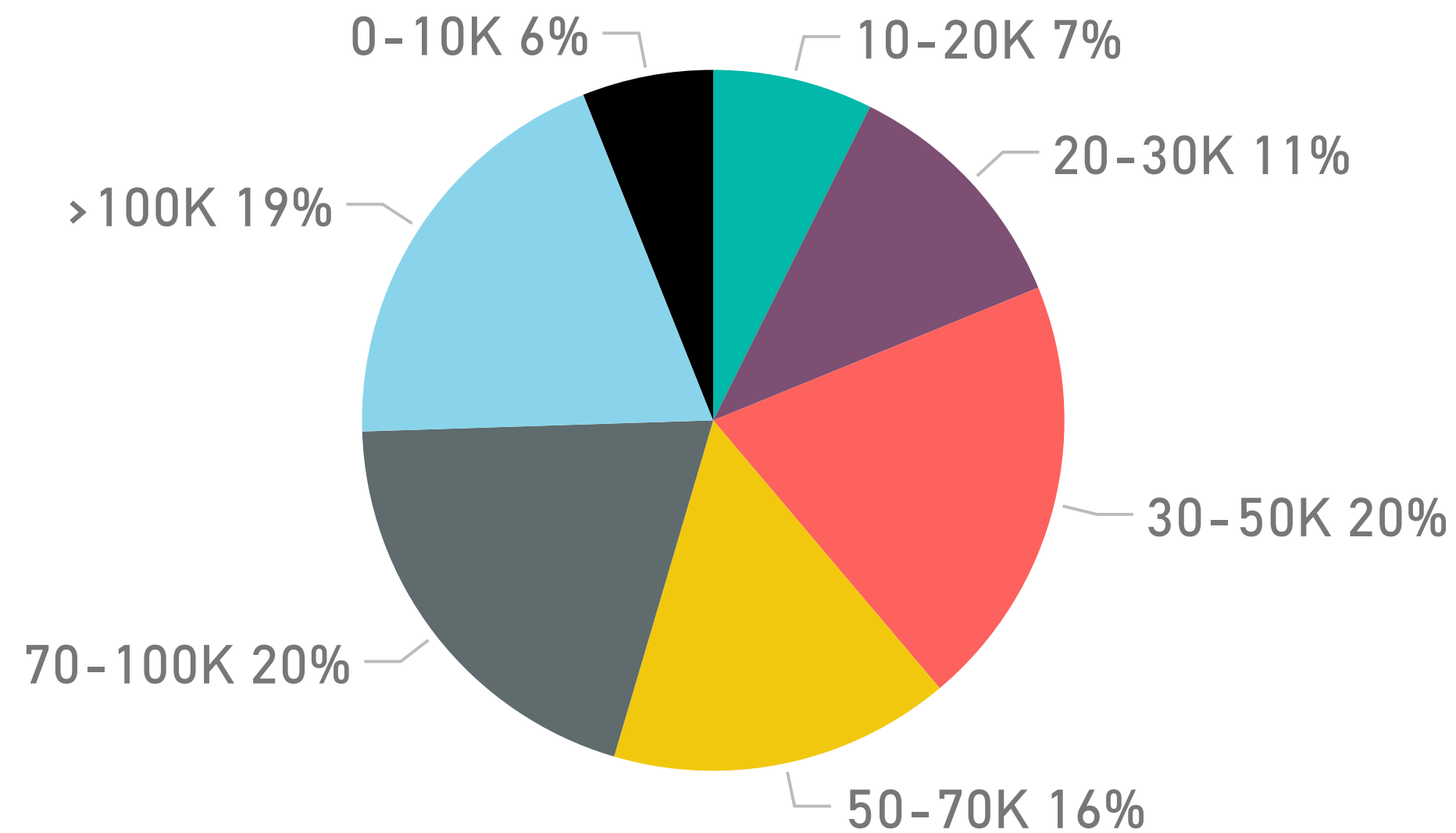
4% of farms earn in excess of €100,000

Major differences accross Farming Systems

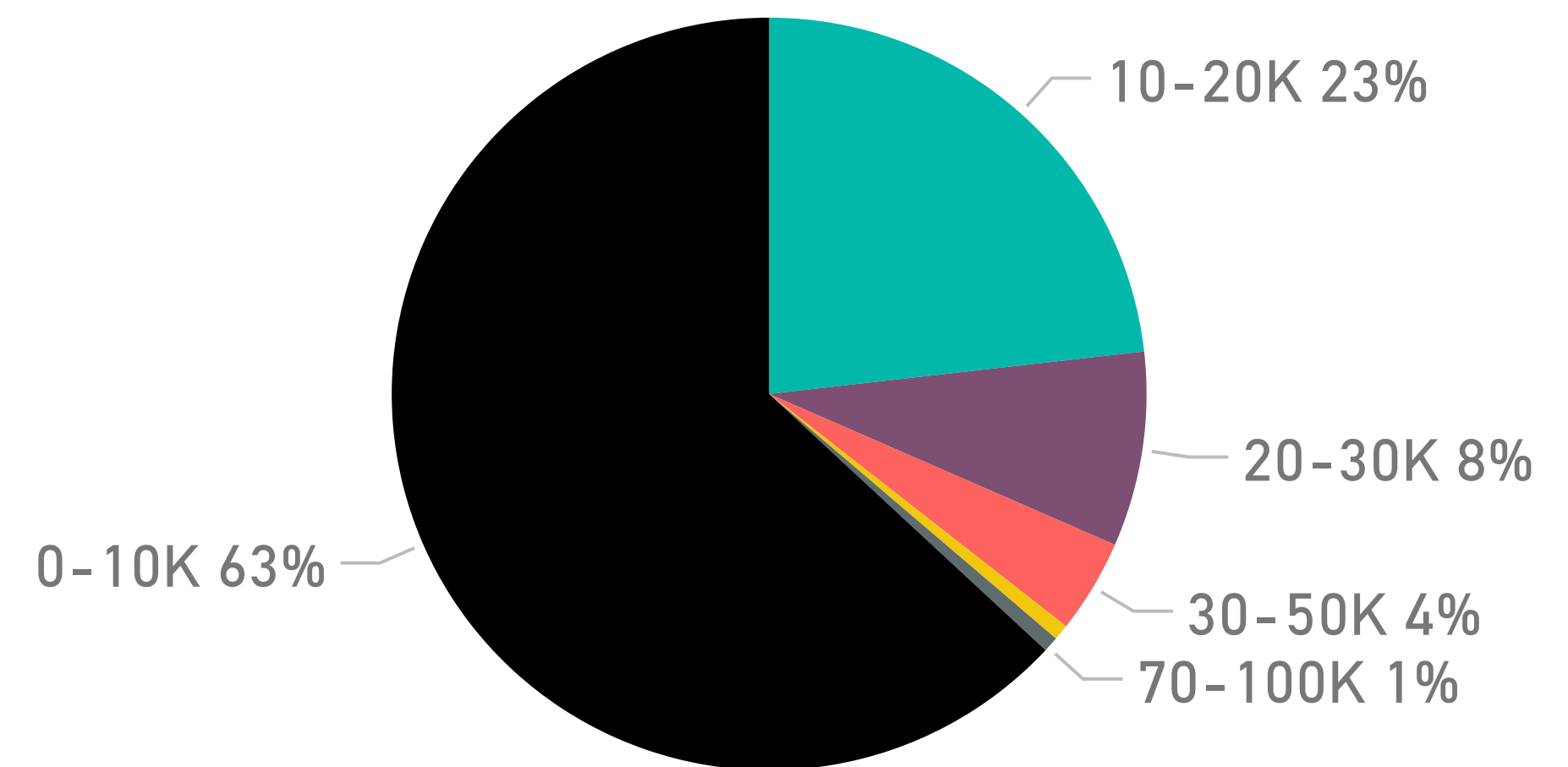
Distribution of Family Farm Income % of farms by FFI Bracket



Distribution of FFI - Dairy Farms 2019

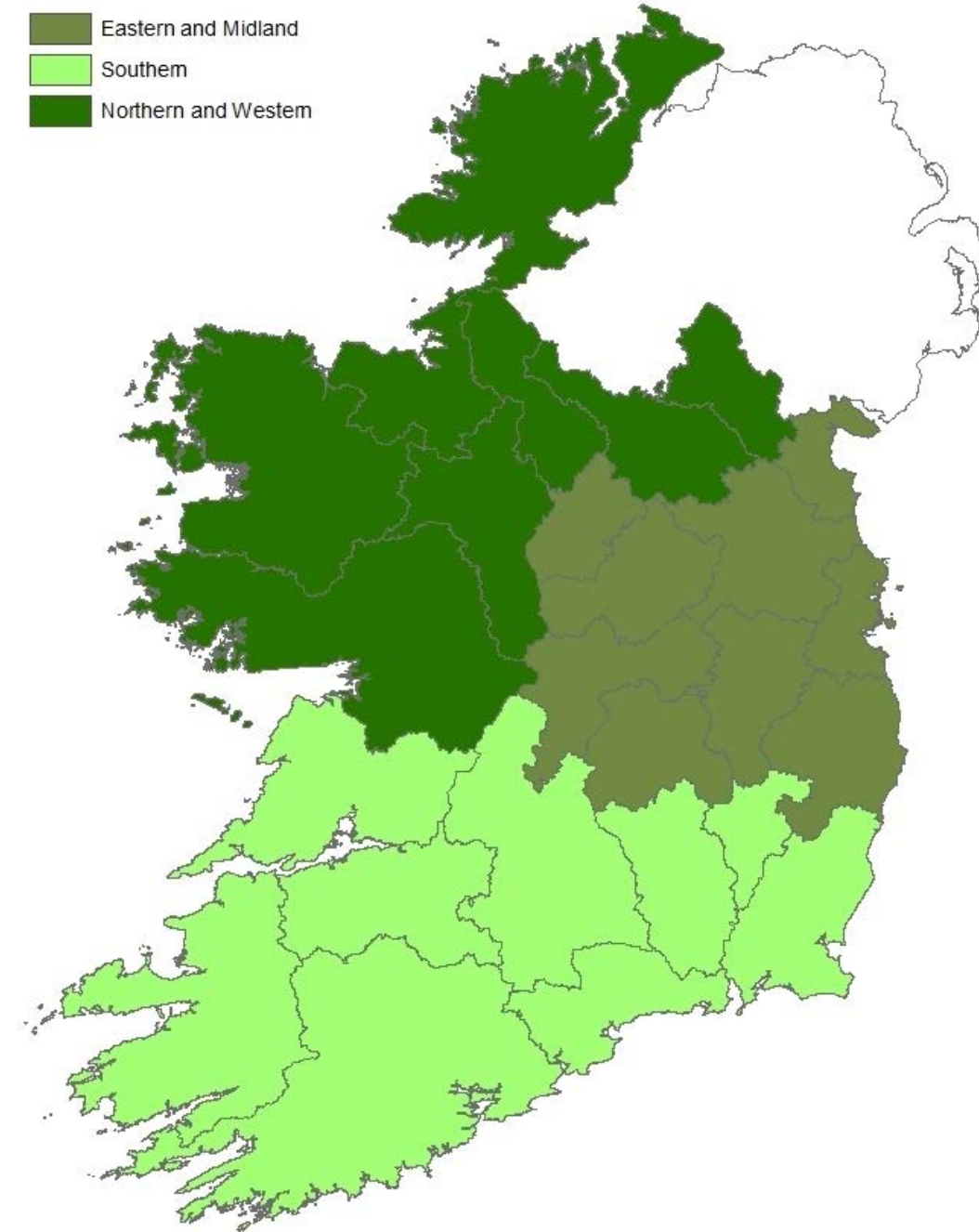


Distribution of FFI - Cattle Rearing Farms 2019



Northern & Western

Farm System	No Of Farms	UAA
ALL Systems	33,946	33.7
Cattle Other	10,111	29.5
Cattle Rearing	13,249	30.3
Dairying	2,352	51.0
Sheep	8,061	39.1
Tillage	173	40.7



Farm Population by Region

Farm System

All

Eastern & Midland

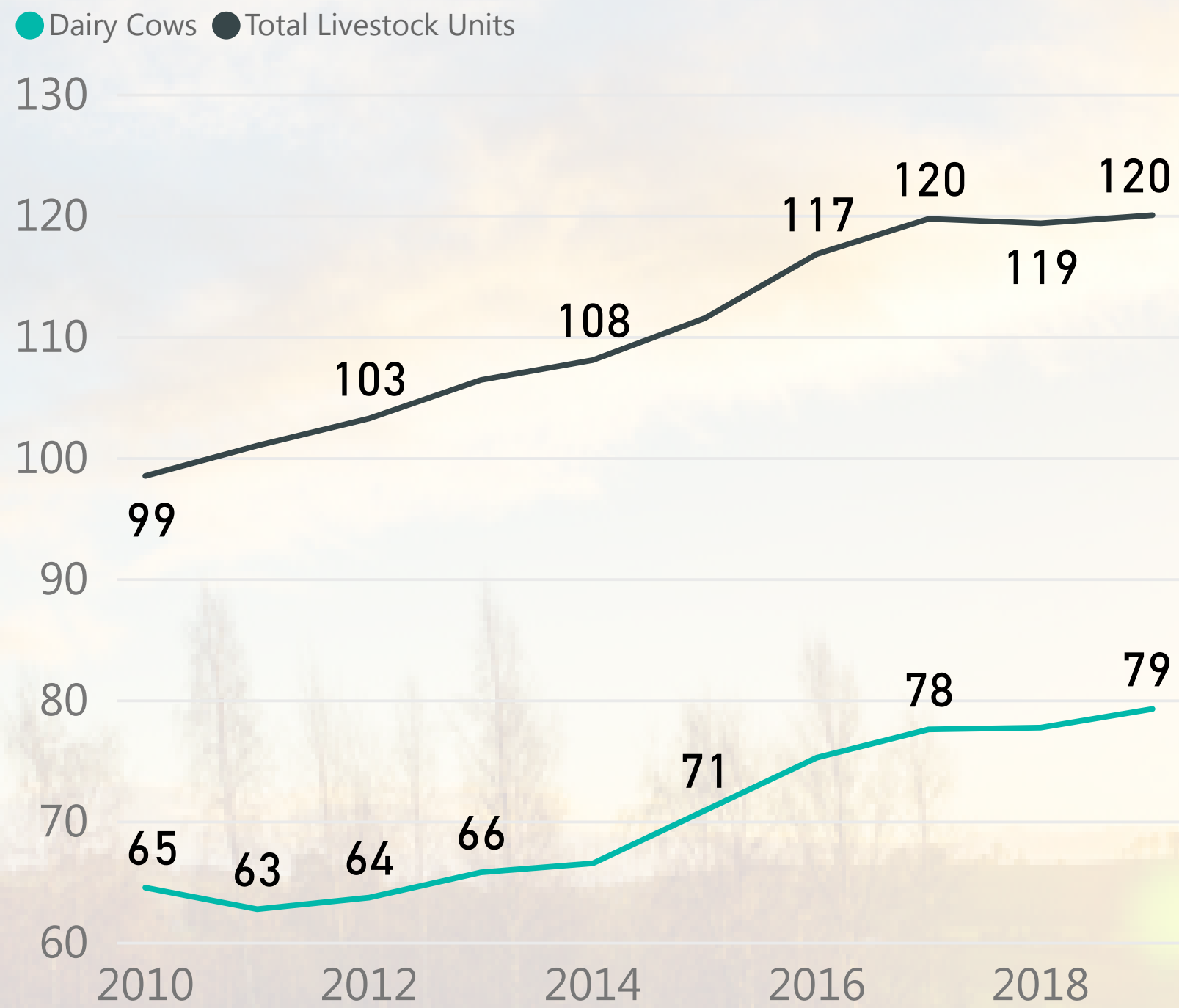
Farm System	No Of Farms	UAA
ALL Systems	17,950	47.5
Cattle Other	6,987	38.8
Cattle Rearing	3,538	36.1
Tillage	2,691	66.8
Sheep	2,417	41.1
Dairying	2,014	72.0

Southern

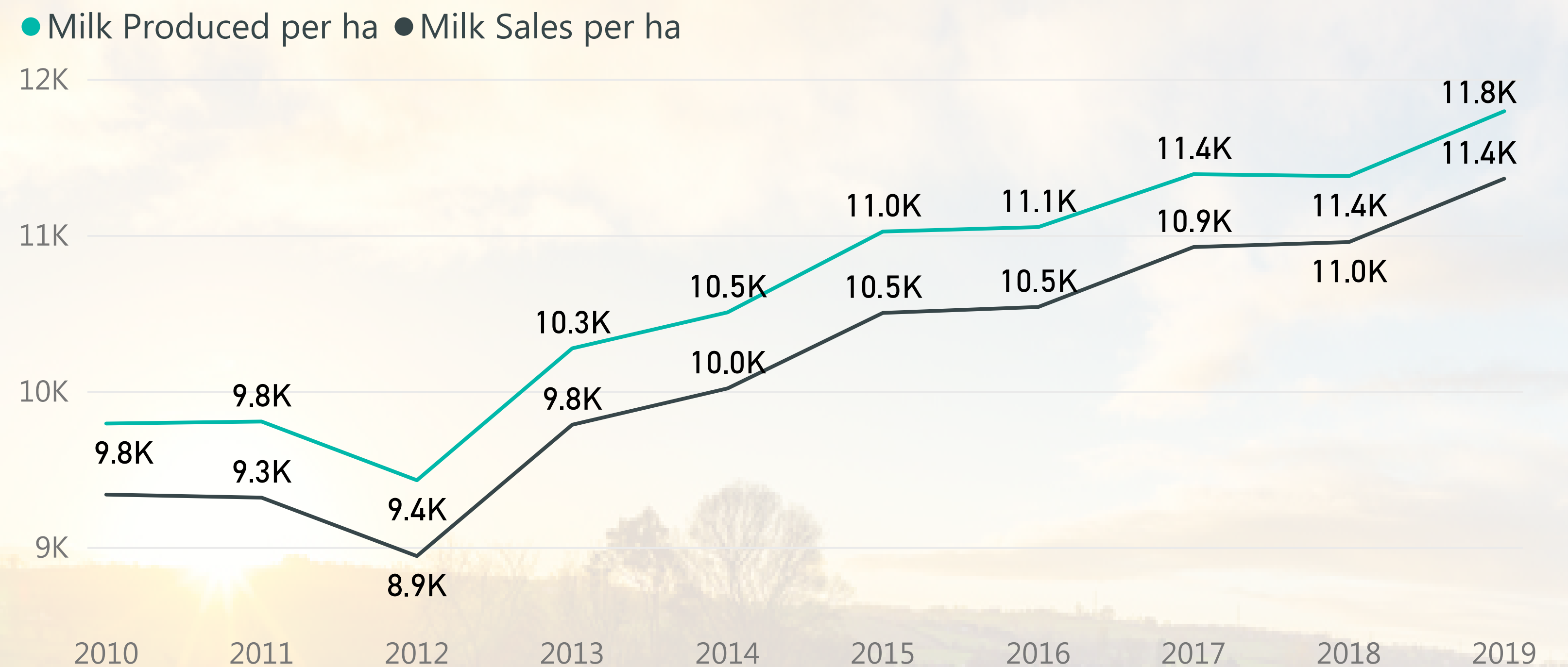
Farm System	No Of Farms	UAA
ALL Systems	39,600	48.4
Cattle Other	10,749	41.2
Cattle Rearing	9,386	32.2
Dairying	11,708	58.3
Sheep	3,844	62.6
Tillage	3,747	59.5

Dairy Trends 2010 - 2019

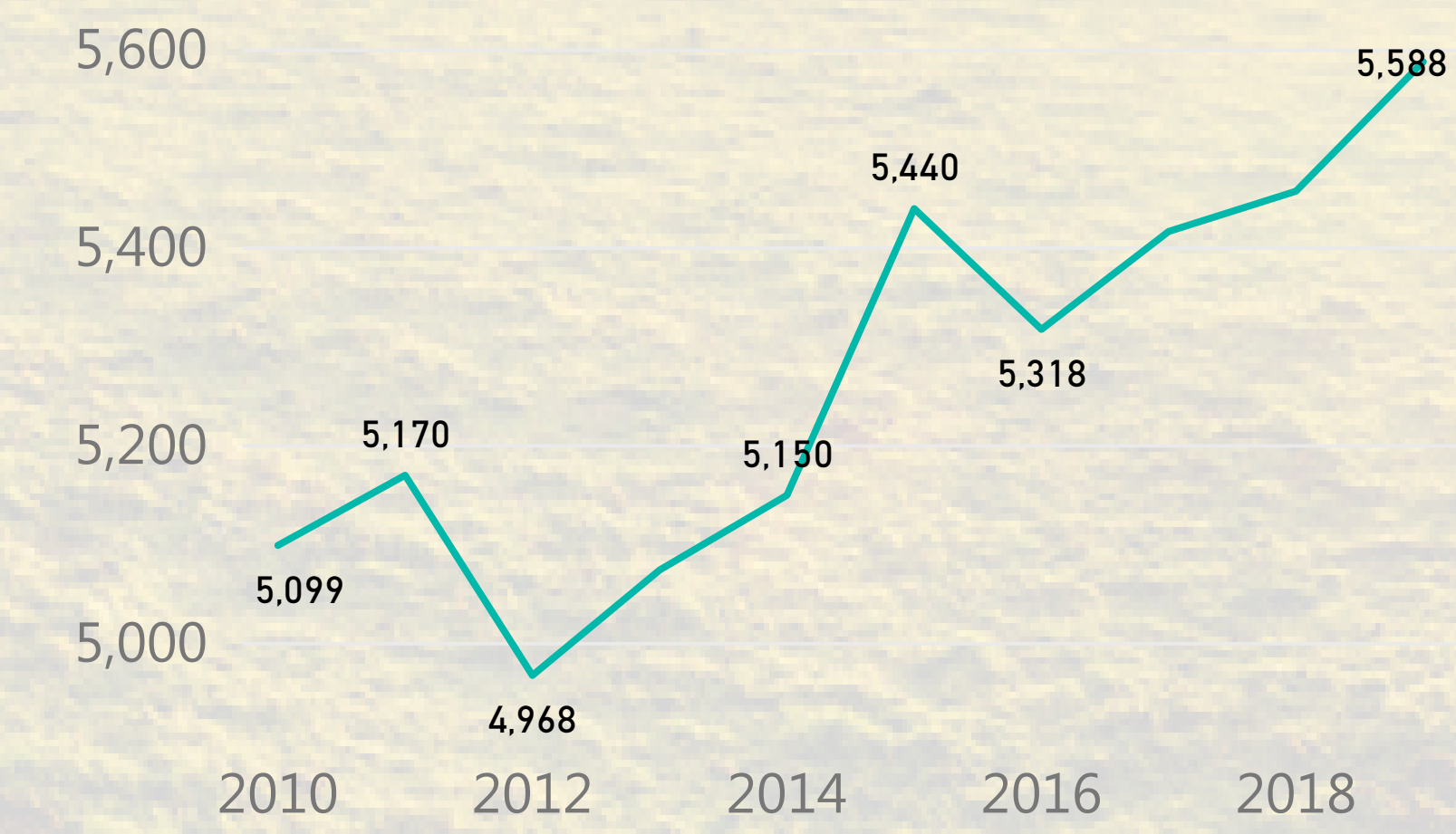
No of Dairy Cows & Total Livestock Units per farm



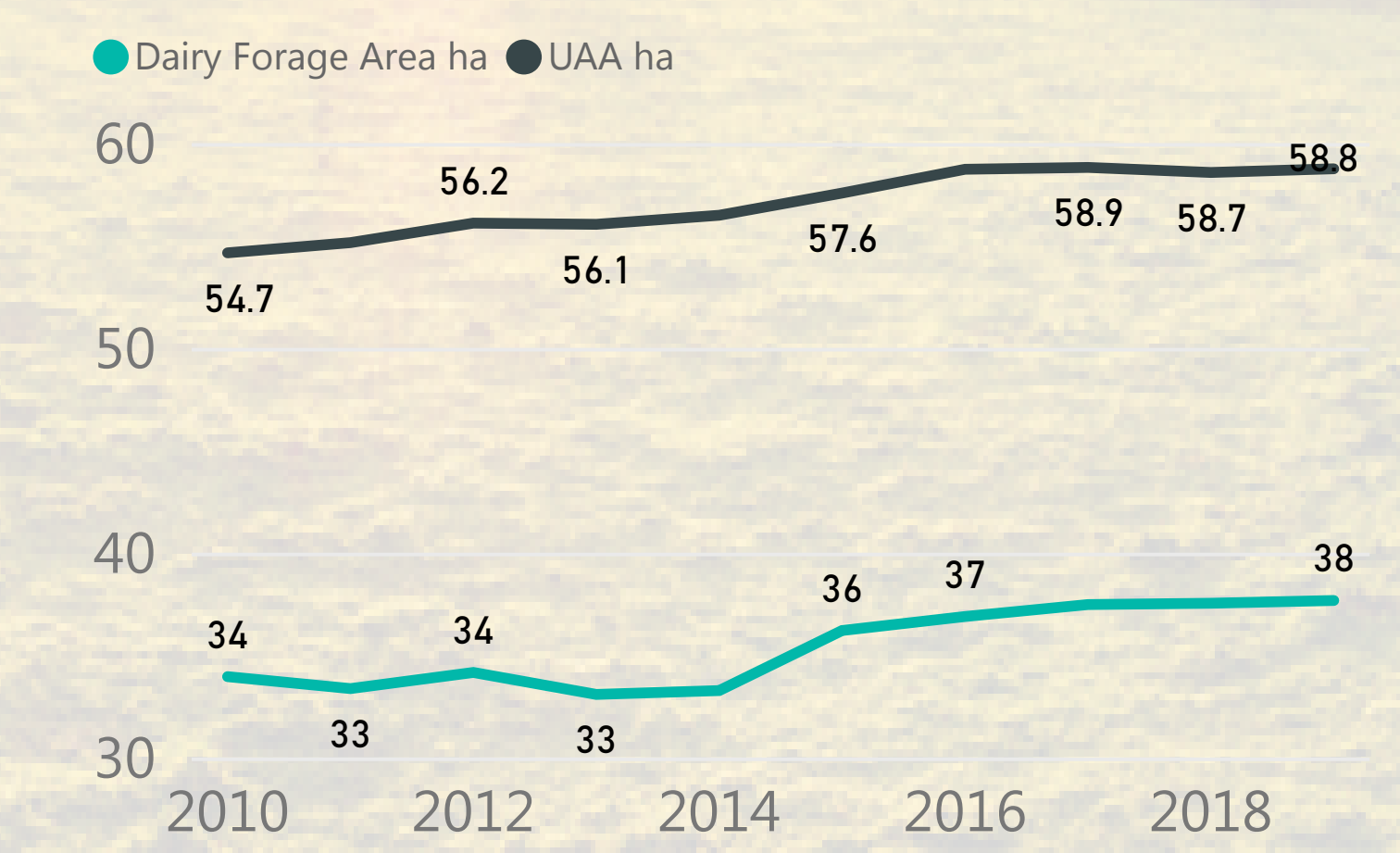
Milk Production & Milk Sales per hectare



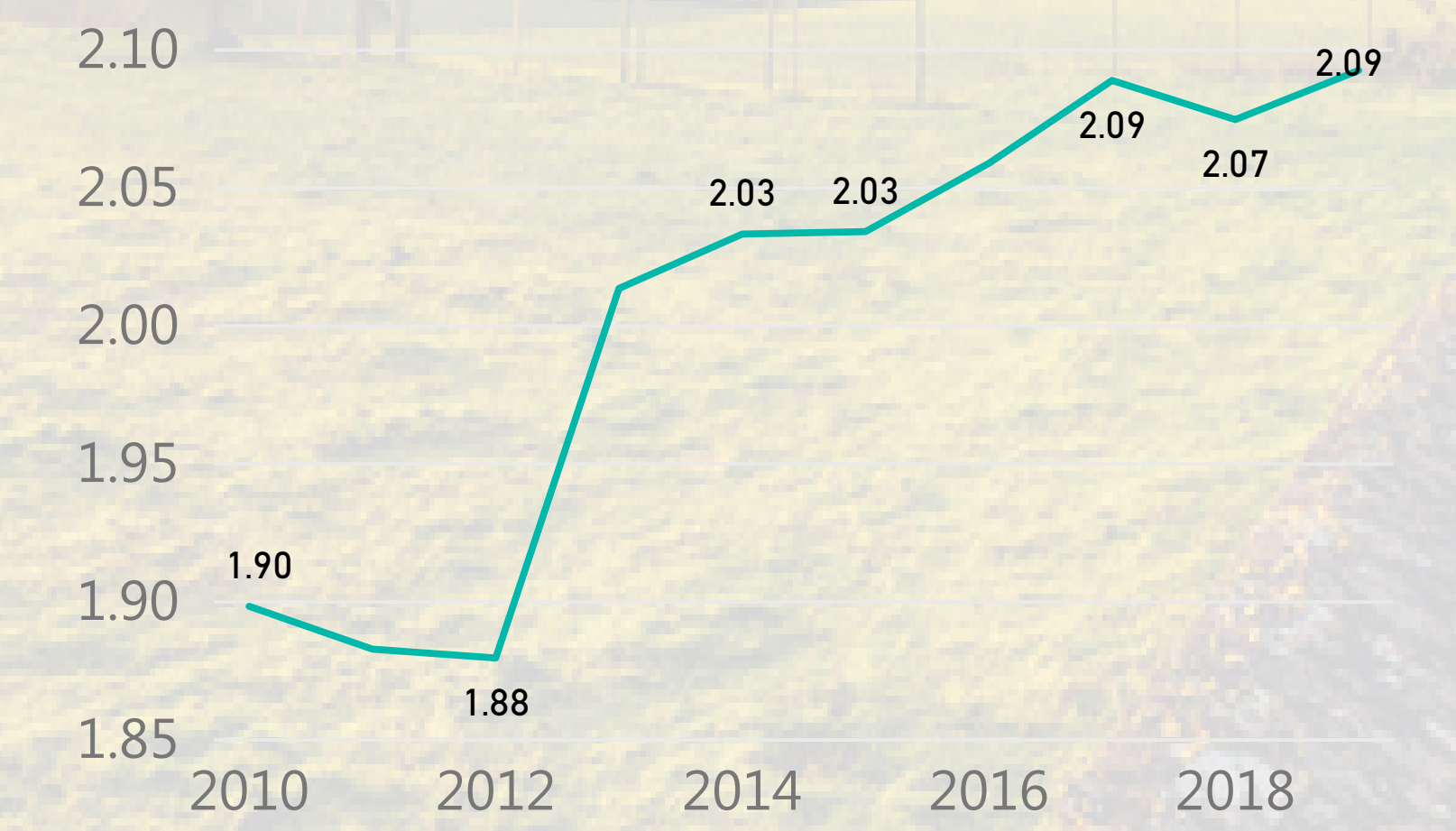
Milk Yield per cow (litres) - Cows per ha

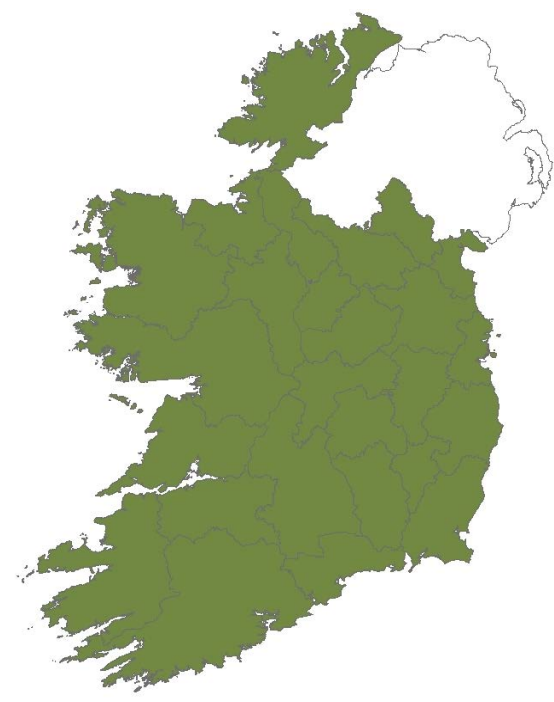


Dairy UAA & Dairy Forage Area



Dairy Stocking Rate - Cows per ha





Dairying System Results National

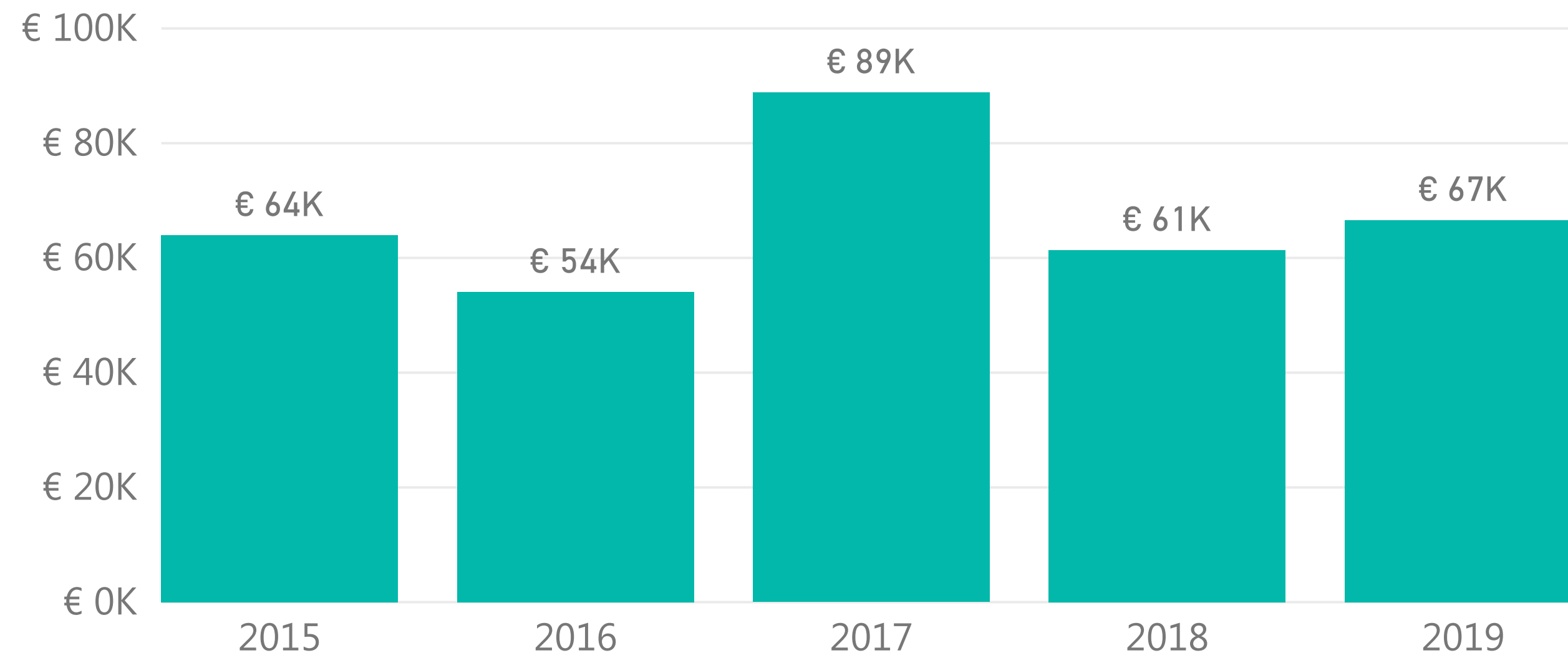
FFI 2019 - € per farm

€ 66,570

Region

National

Dairy Farm Income 2015-2019



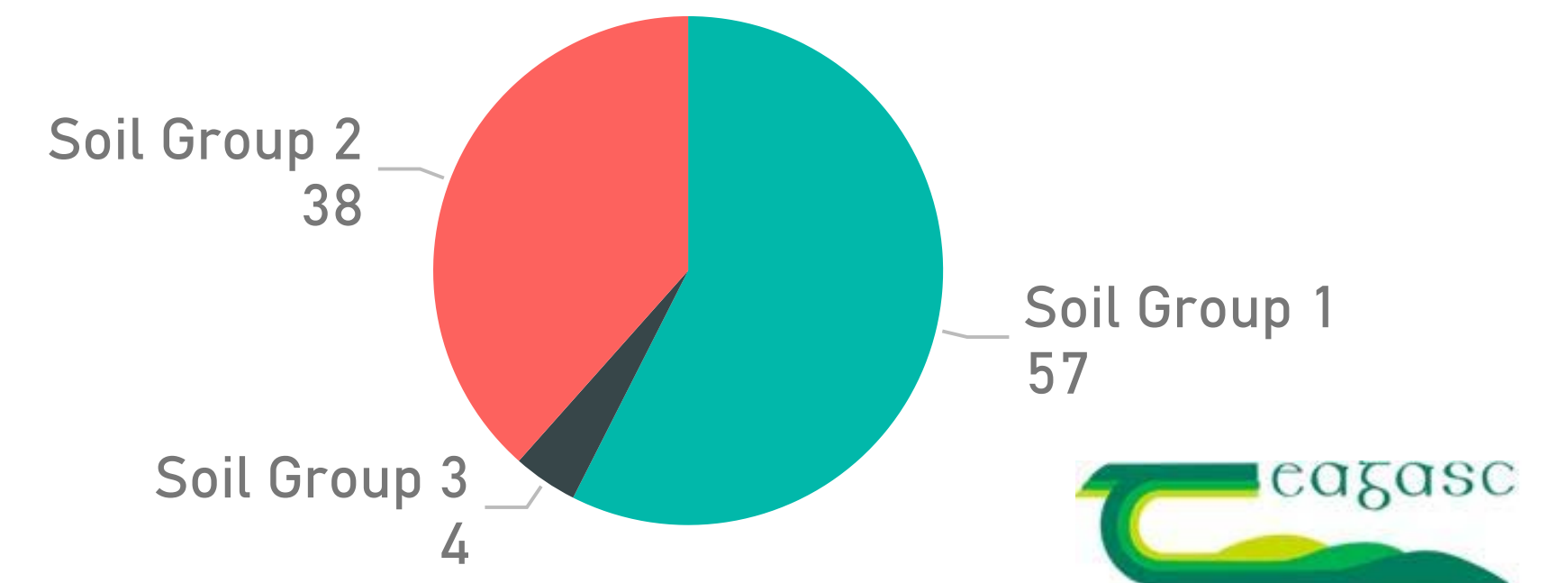
Output & Margins cents per litre of milk 2015-2019

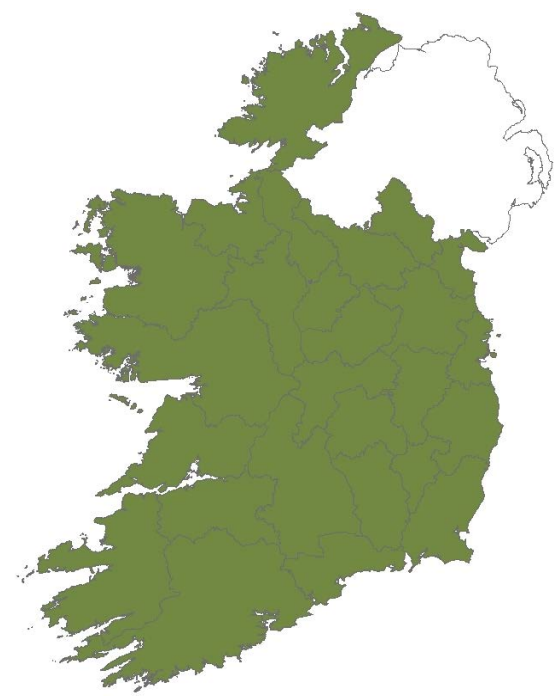
Year	Milk price cpl	Total Production Costs cpl	Net Margin cpl
2015	31.1	22.7	9.8
2016	28.2	22.0	6.6
2017	37.0	23.4	15.0
2018	35.7	27.1	9.5
2019	34.7	25.1	10.1

Farm Characteristics 2015-2019

Year	Family Labour	Total	Area_Owned	UAA	FFI per ha	FFI per cow
2015	1.39	1.60	47.2	57.6	€ 1,109	€ 904
2016	1.38	1.62	47.3	58.8	€ 919	€ 717
2017	1.39	1.64	47.3	58.9	€ 1,508	€ 1,152
2018	1.36	1.62	46.6	58.7	€ 1,046	€ 789
2019	1.38	1.64	47.2	58.8	€ 1,132	€ 839

Soil Types

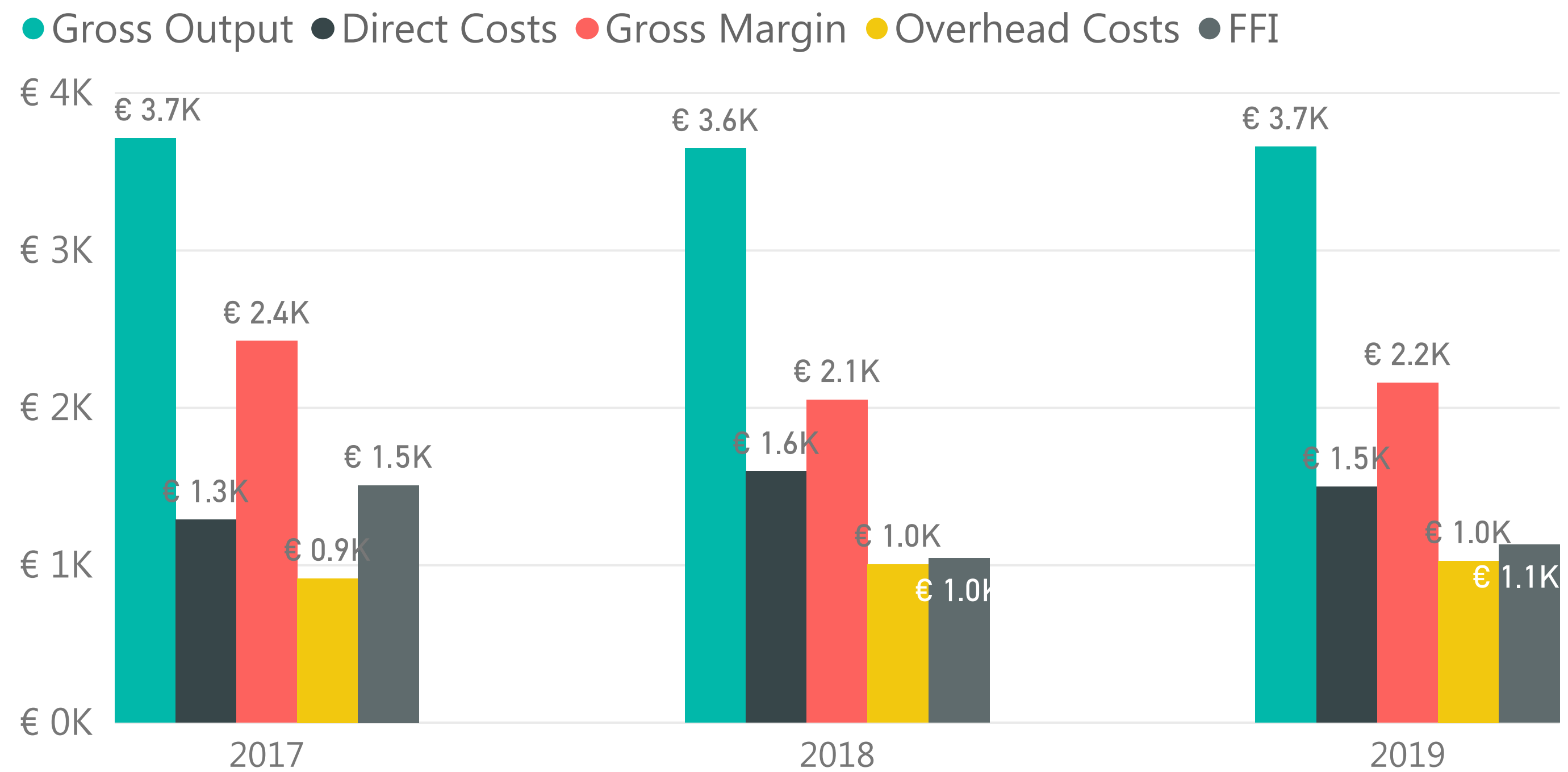




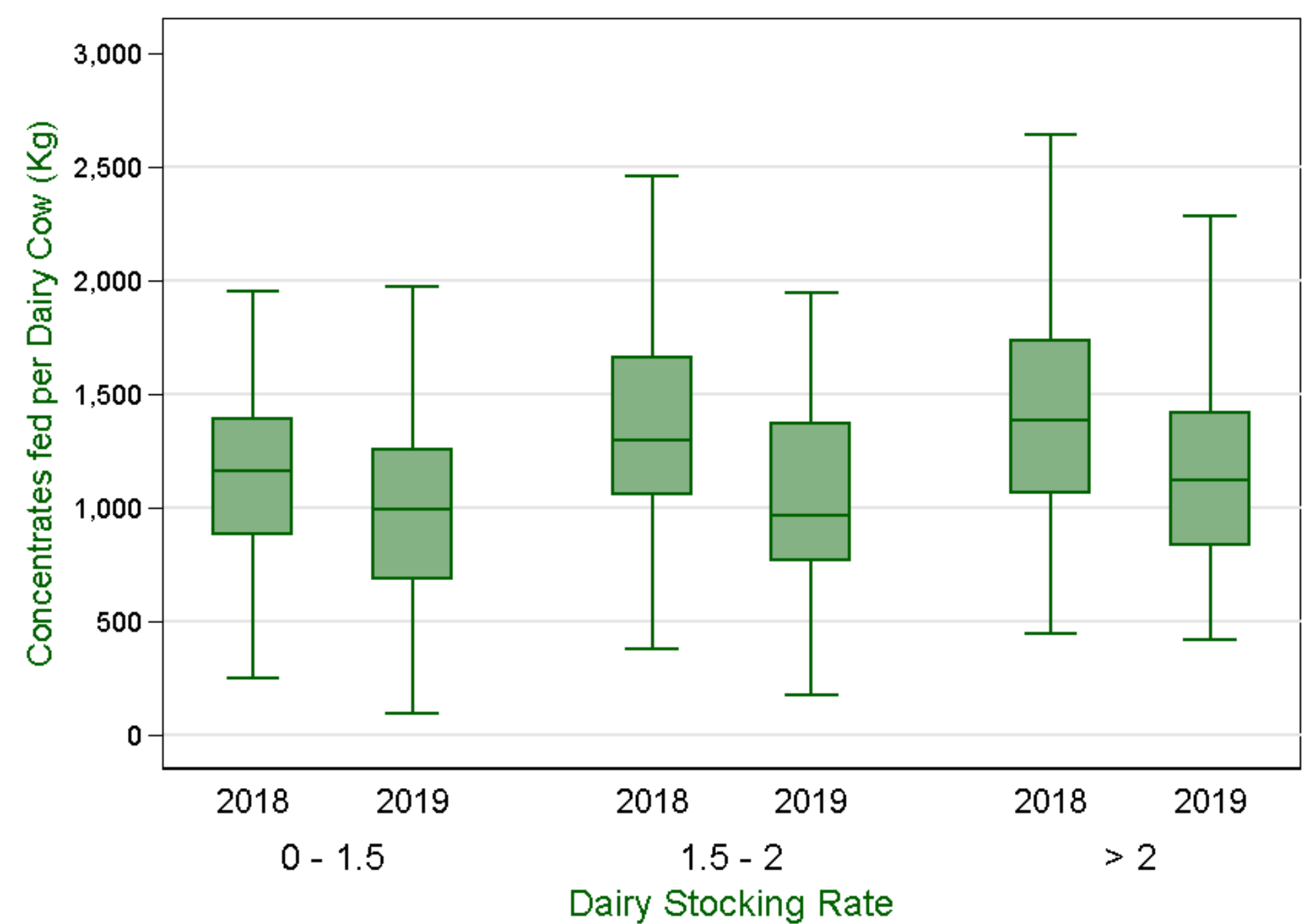
Dairying System Results National

Region

Financial Performance per hectare 2017-2019

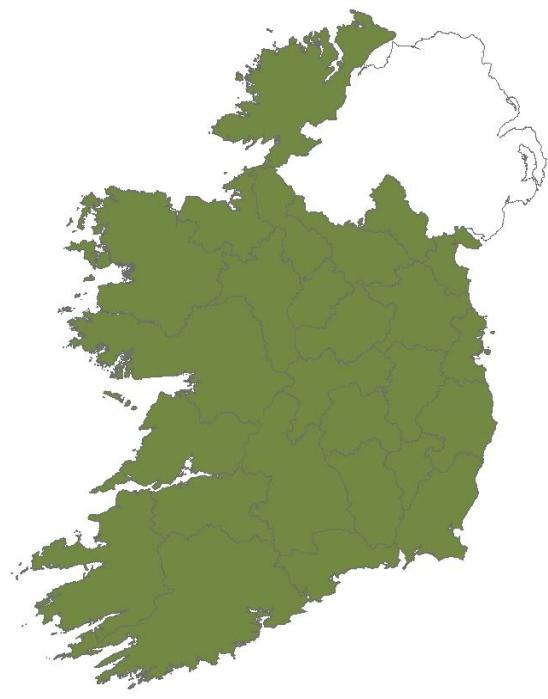


Concentrates Fed per Cow by Stocking Rate 2018-2019



Selected Dairy technical performance Indicators 2017 - 2019

Year	Stocking Rate (Cows /ha)	Conc Feed Kg per cow	SCC	Yield per cow (lt)	Milk Produced per ha (lt)
2017	2.09	1,037	163	5,417	11,396
2018	2.07	1,378	178	5,457	11,383
2019	2.09	1,122	164	5,588	11,799



Dairying System Results National

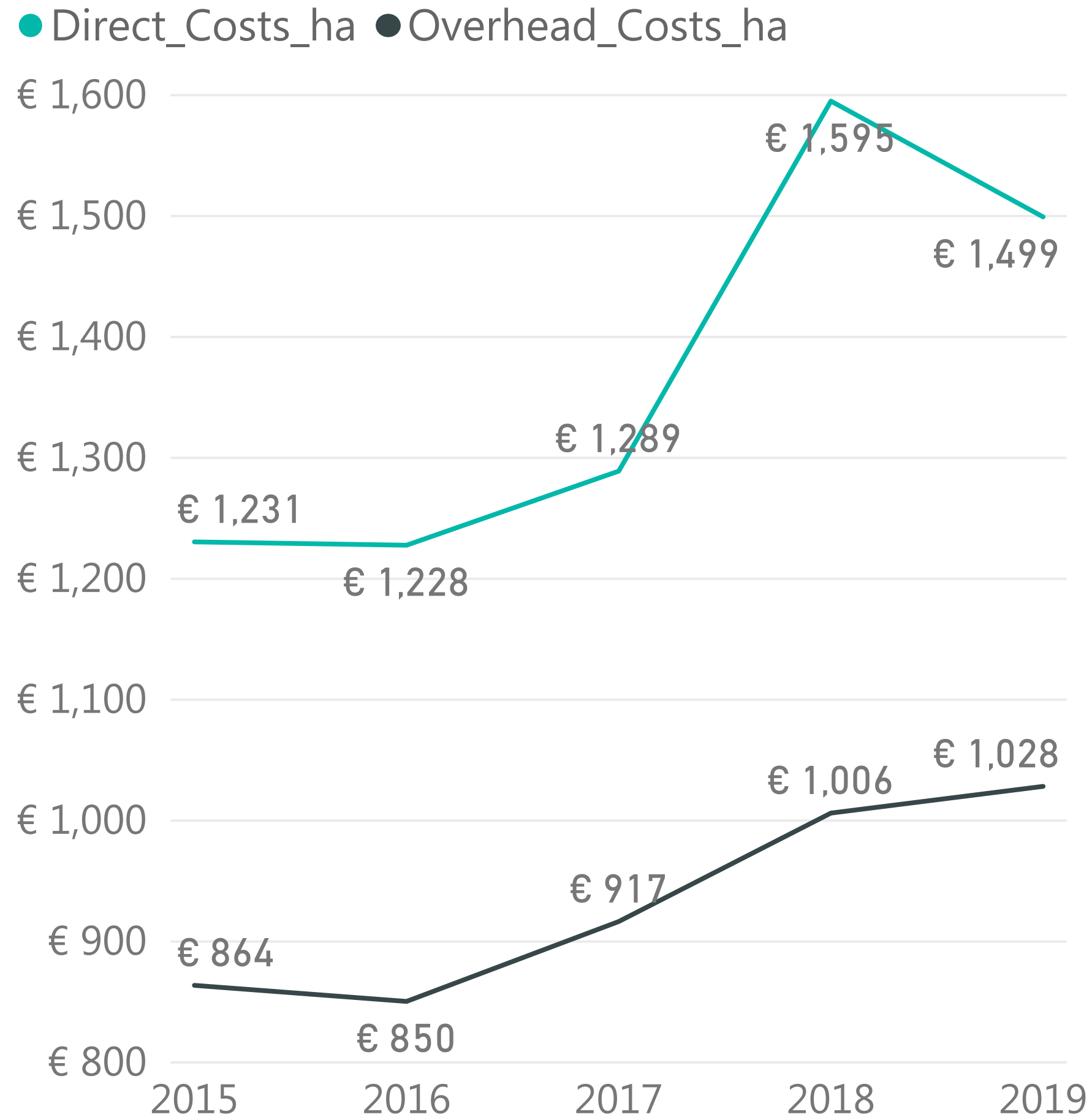
Farm System

Dairying

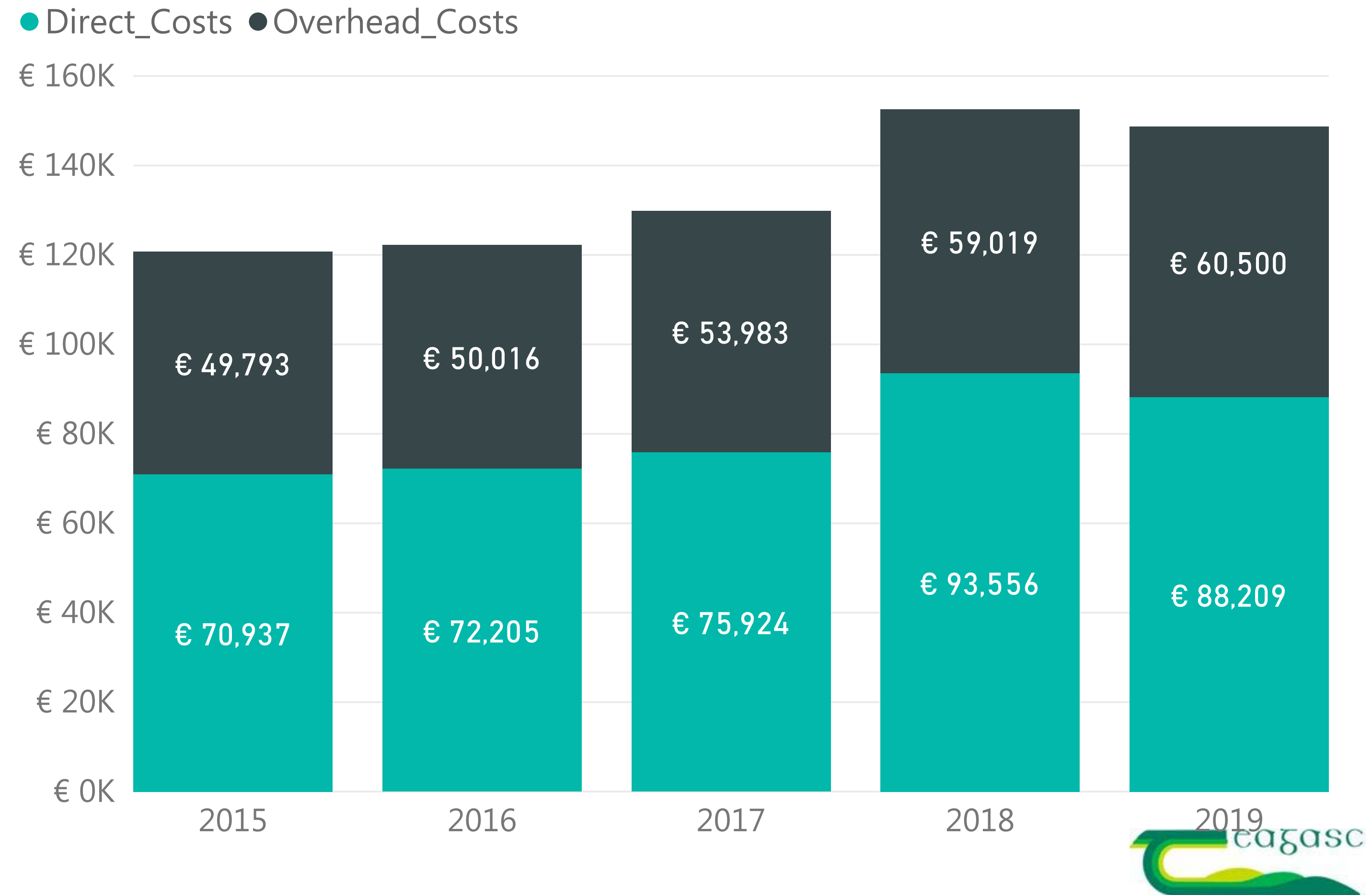
Region

National

Average Farm Costs per hectare 2015 - 2019



Average Total Farm Costs 2015 -2019



Costs of Production by System

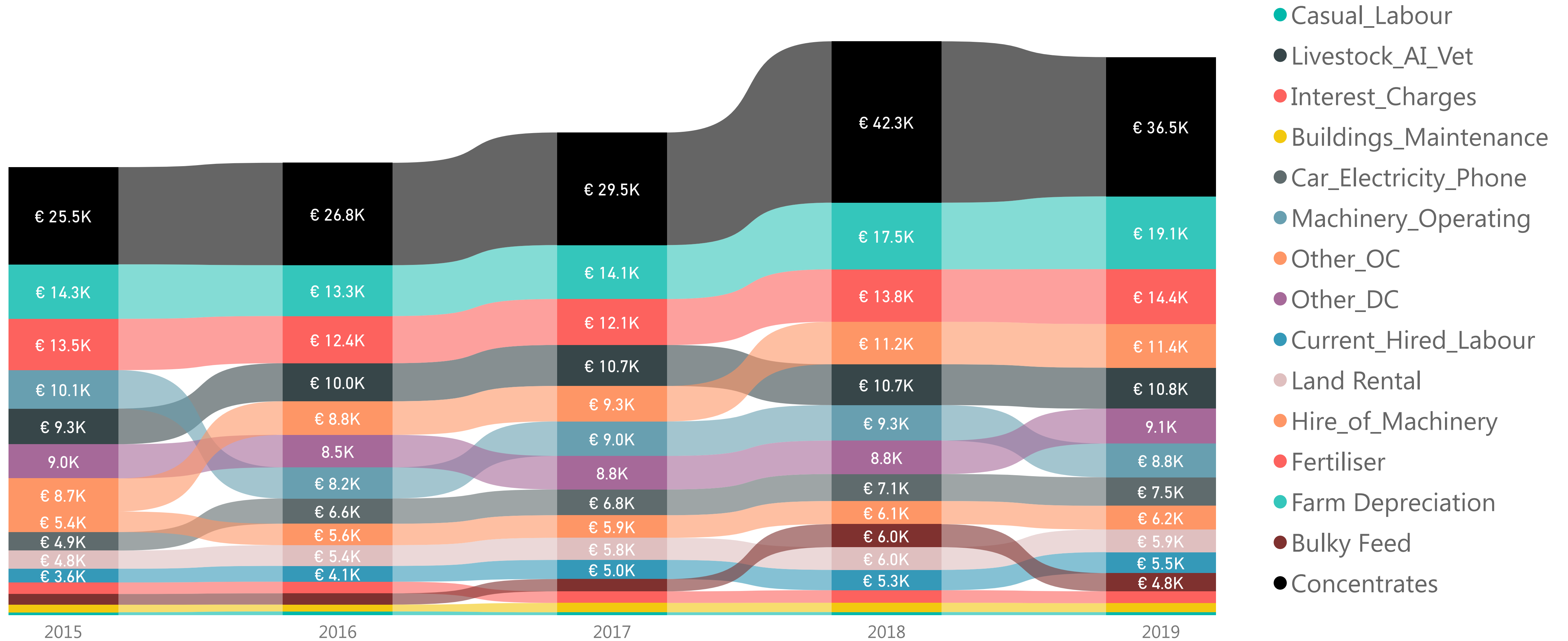
Farm System

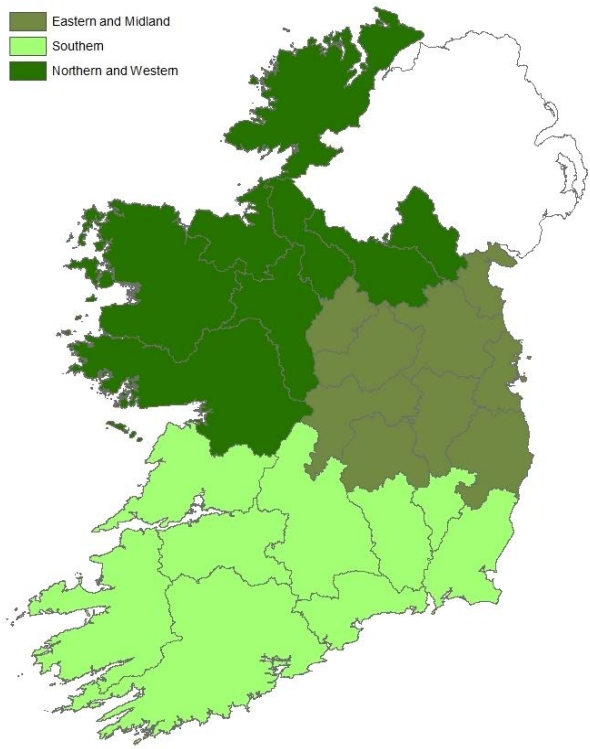
Dairying

Region

National

Selected Costs per farm 2015 - 2019



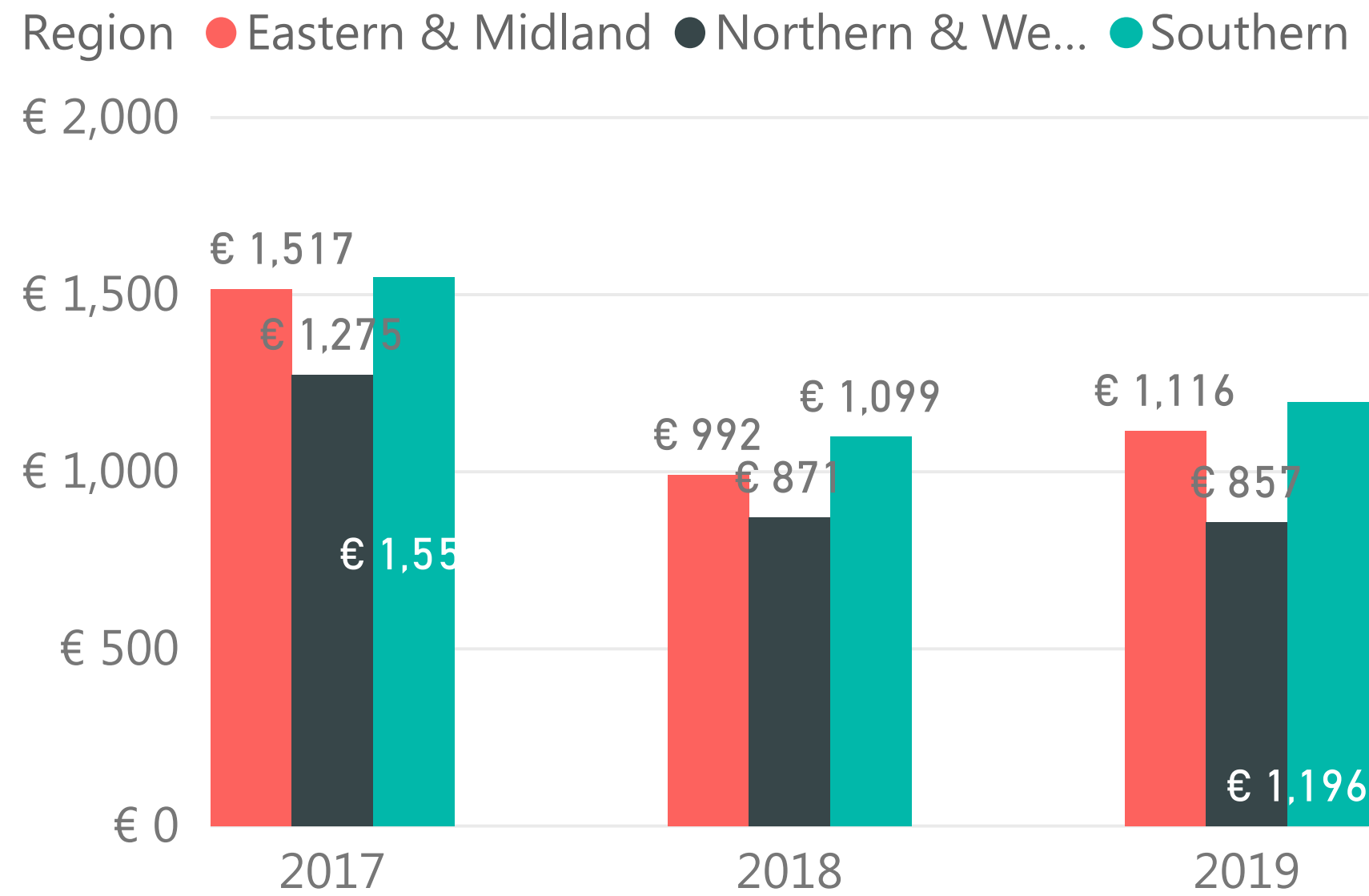


Dairying System Results Regional

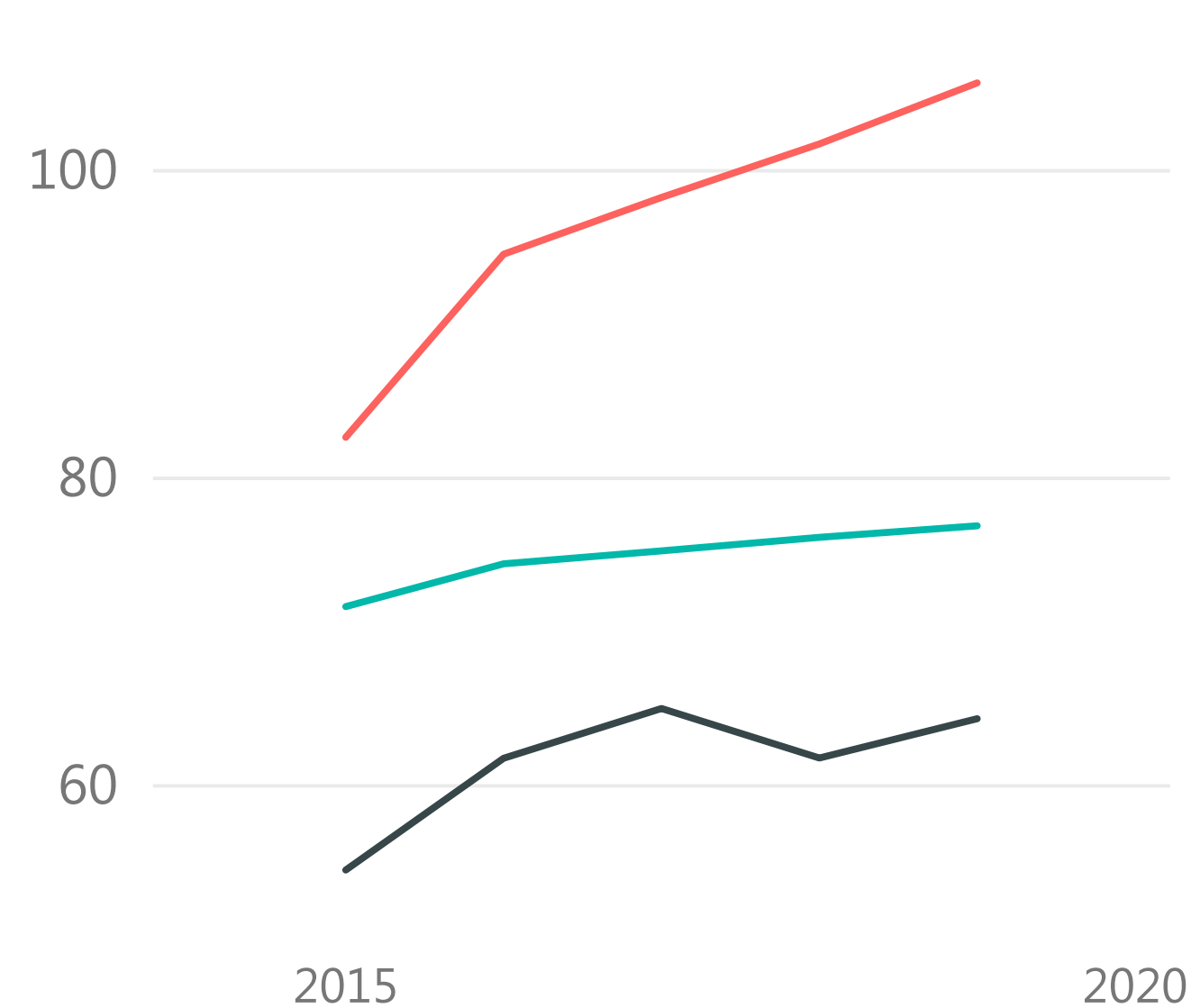
Farm Characteristics 2019

Region	Dairy Cows	Area Owned ha	UAA ha	Stocking Rate cows per ha	Family Labour	Total Labour ▼
Eastern & Midland	105.7	53.7	72.0	2.26	1.28	1.78
Northern & Western	64.4	41.9	51.0	1.88	1.41	1.66
Southern	76.9	47.8	58.3	2.11	1.40	1.60

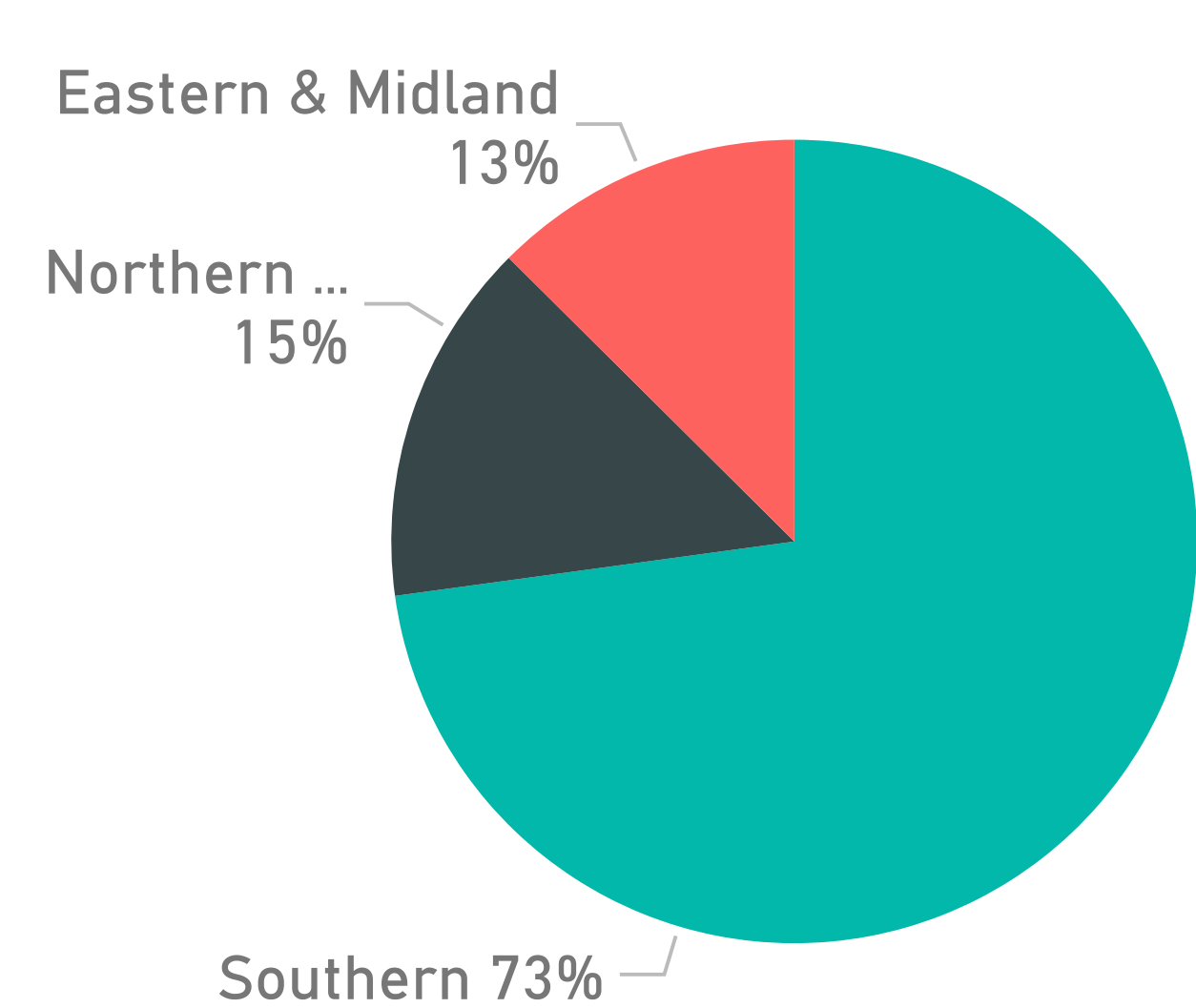
FFI per hectare 2019



Dairy Cows per farm 2019



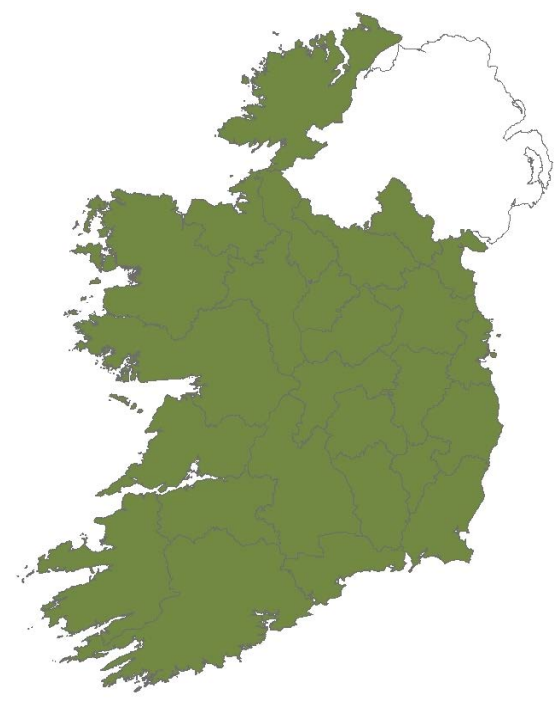
Dairy Population 2019



Selected Dairy technical performance Indicators 2019

Region	Conc Feed per cow kg	Conc feed cent per litre	Milk Price	Net Margin	FFI per cow	Gross_Margin_cow	Gross_Margin_ha
Eastern & Midland	1,124	5.56	34.7	9.6	€ 760	€ 1,605	€ 2,356
Northern & Western	1,505	7.52	33.7	6.9	€ 679	€ 1,499	€ 1,893
Southern	1,017	5.38	34.9	11.0	€ 907	€ 1,629	€ 2,148





Cattle Rearing System Results National

FFI 2019 - € per farm

€ 9,188

Region

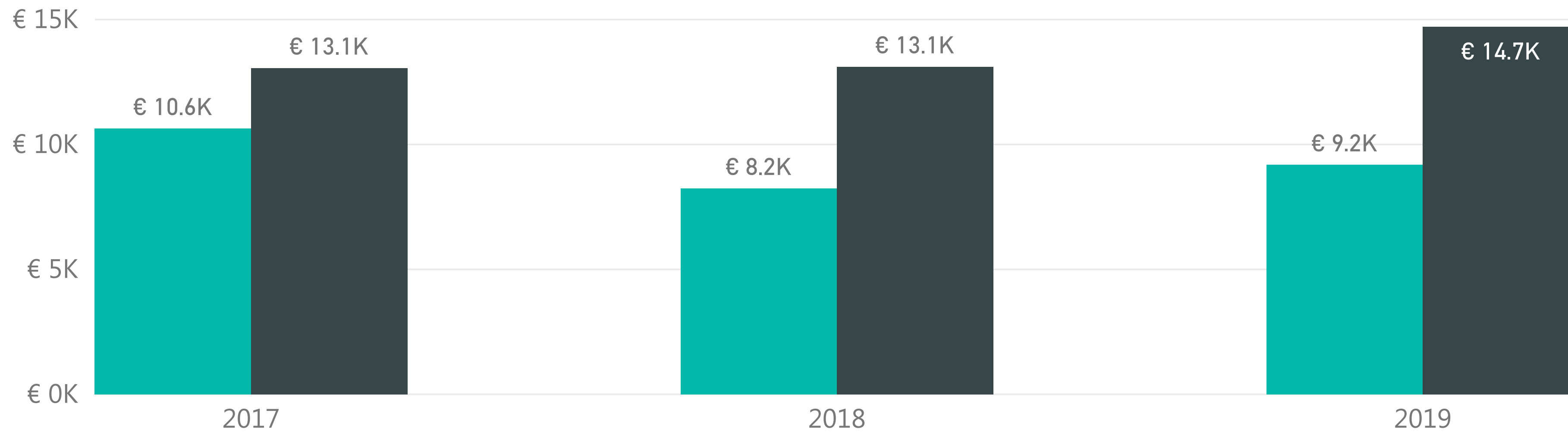
National

Income Drivers

- Gross Output up 2%
- Increase in Direct Payments up 12%
- Direct Costs down 8%
- Feed down 20%
- Fertiliser down 8%
- FFI up 11%

Cattle Farm Income 2017 - 2019

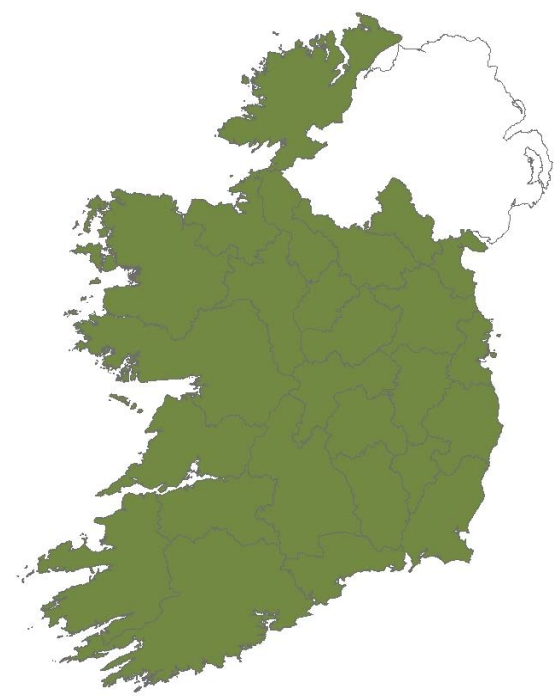
● Family Farm Income ● Total Direct Payments



Farm Characteristics 2017 - 2019

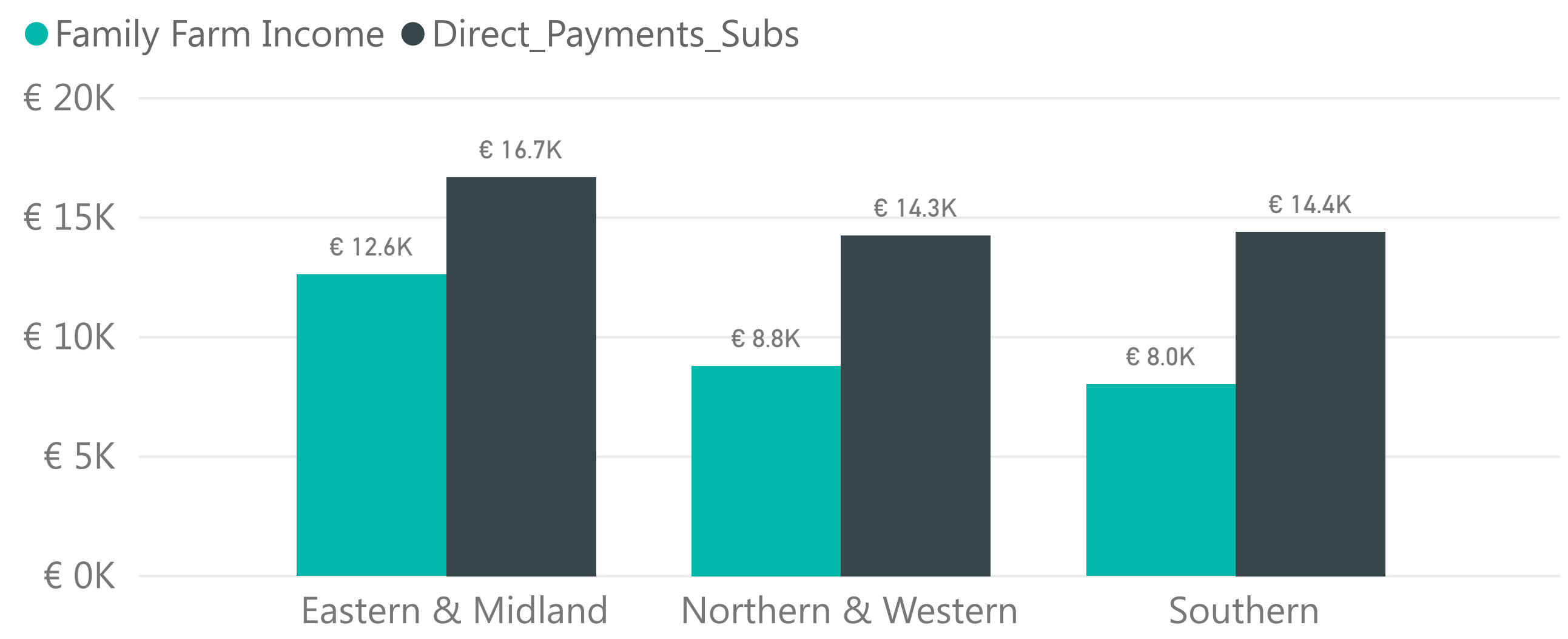
Year	Farmer Age	Family Labour	Area_Owned	UAA	FFI per ha	Suckler Cows	Livestock Units	Gross_Margin_ha
2017	54.9	0.95	29.3	32.6	€ 326	24.0	36.82	€ 758
2018	58.8	0.92	28.7	30.8	€ 268	22.6	35.15	€ 732
2019	59.3	0.96	29.3	31.9	€ 288	23.5	36.65	€ 763



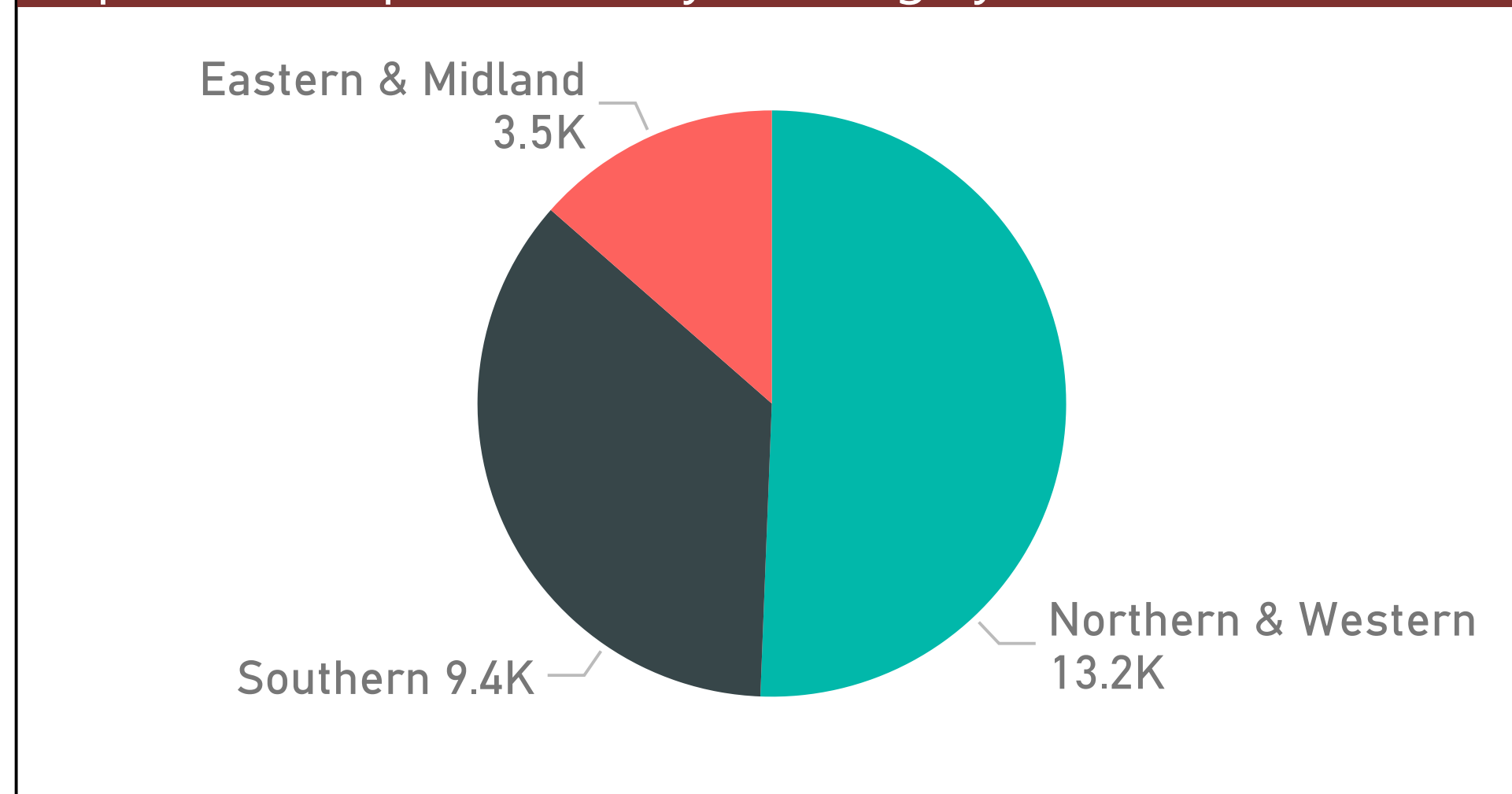


Cattle Rearing System Results Regional

Cattle Farm Income 2019



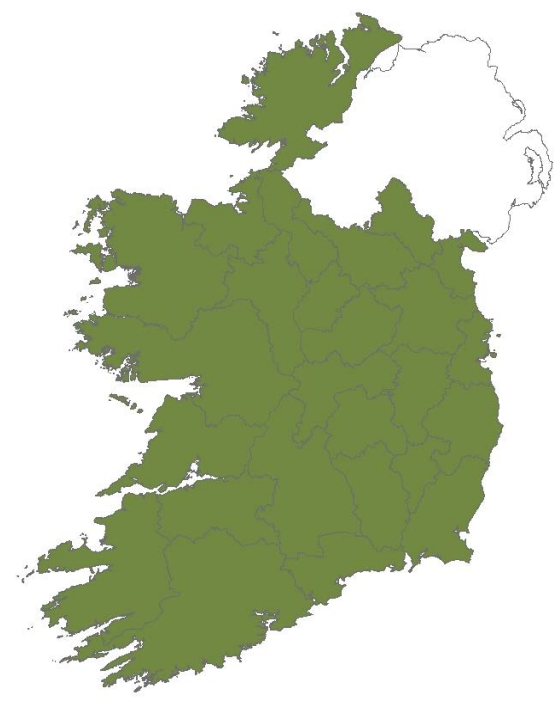
Population Represented by Farming System 2019



Farm Characteristics 2019

Region	Farmer Age	UAA	Suckler Cows	Livestock Units	Gross Output per ha	Direct Payments per ha	FFI per ha	Off farm employment Holder %
Eastern & Midland	65.4	36.1	29.9	46.68	€ 1,254	€ 462	€ 349	27.9
Northern & Western	56.1	30.3	21.2	33.59	€ 1,121	€ 471	€ 290	48.1
Southern	60.3	32.2	23.0	35.21	€ 1,114	€ 447	€ 249	34.7





Cattle Other System Results National

FFI 2019 - € per farm

€ 13,893

Region

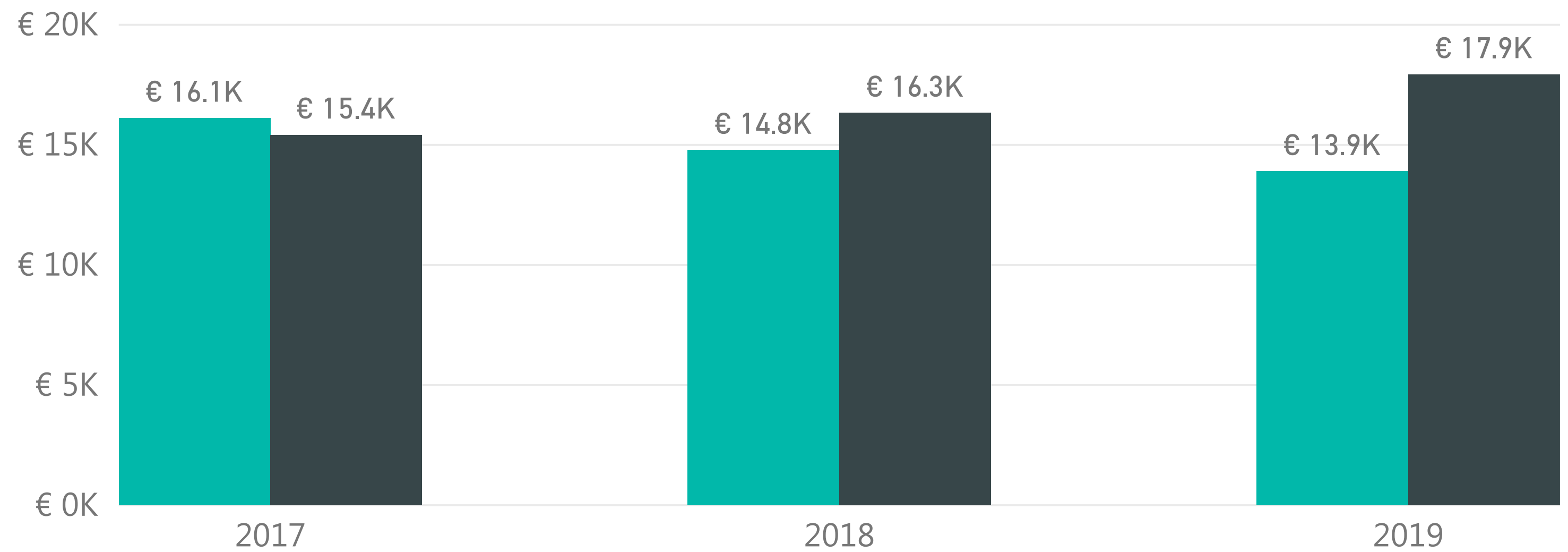
National

Income Drivers 2019

- Gross Output down 4%
- Direct Payments up 10%
- Direct Costs down 6%
- Feed down 12%
- Fertiliser down 8%
- FFI down 5%

Cattle Farm Income 2017 - 2019

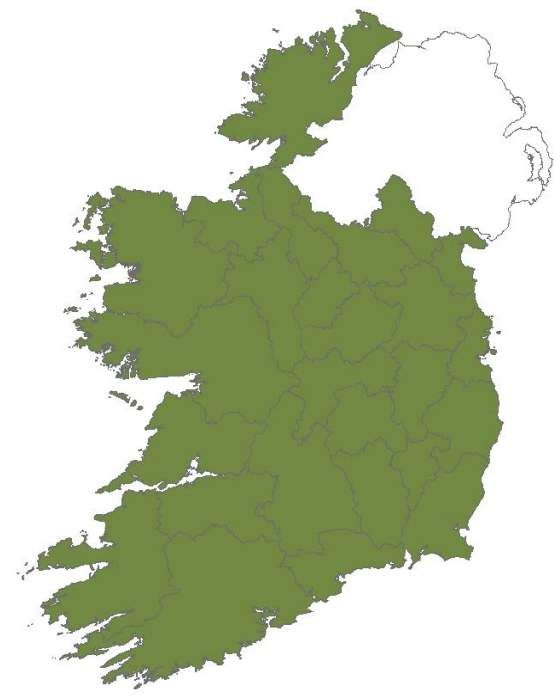
● Family Farm Income ● Total Direct Payments



Farm Characteristics 2017 - 2019

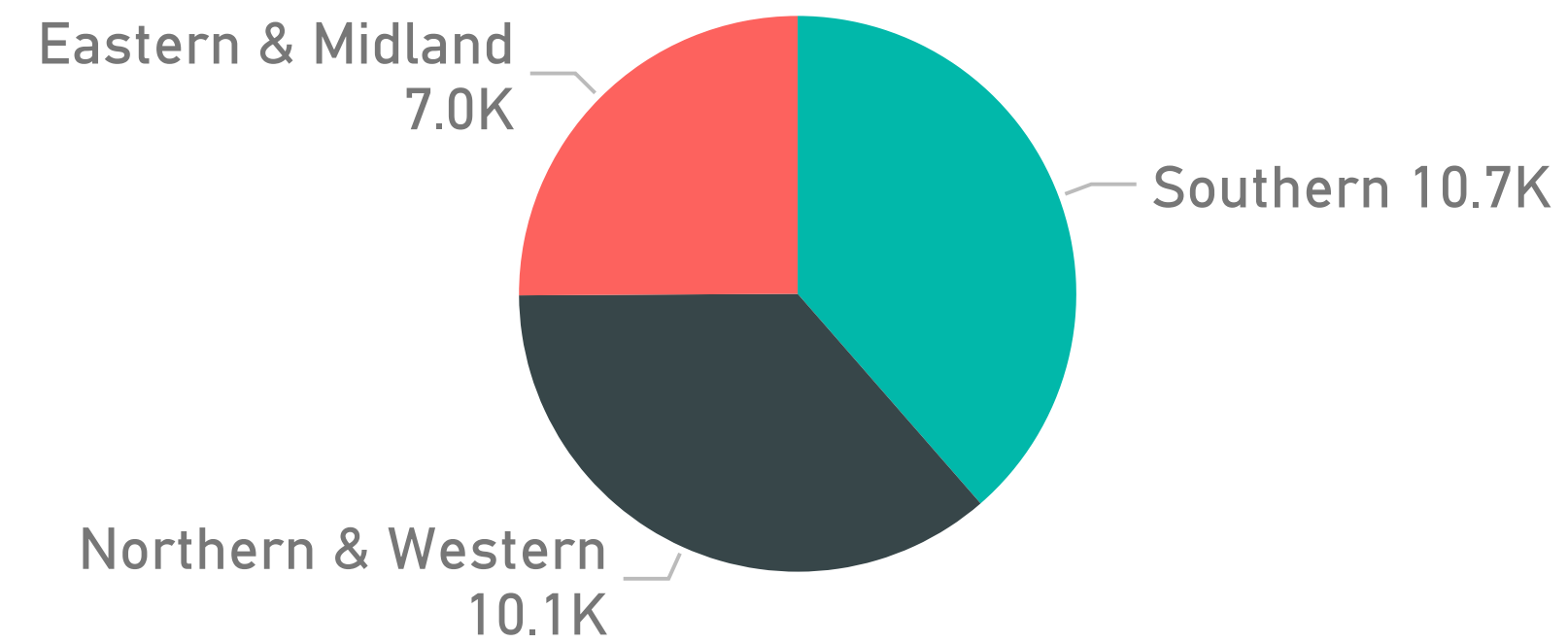
Year	Farmer Age	Family Labour	Area_Owned	UAA	FFI per ha	Livestock Units
2017	56.6	0.88	33.4	35.0	€ 460	47.20
2018	59.2	0.90	35.3	37.2	€ 397	50.38
2019	59.5	0.91	33.9	36.2	€ 384	47.61





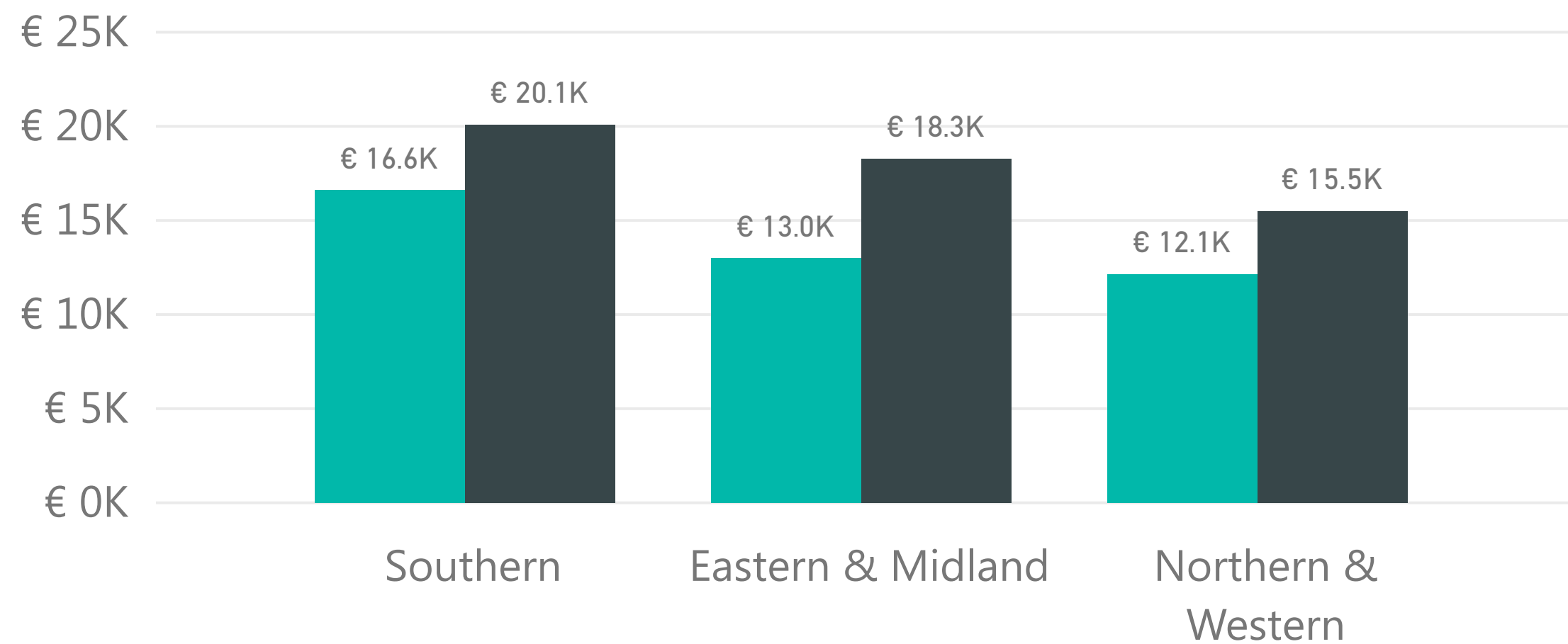
Cattle Other System Results Regional

Population Represented by Farming System 2019



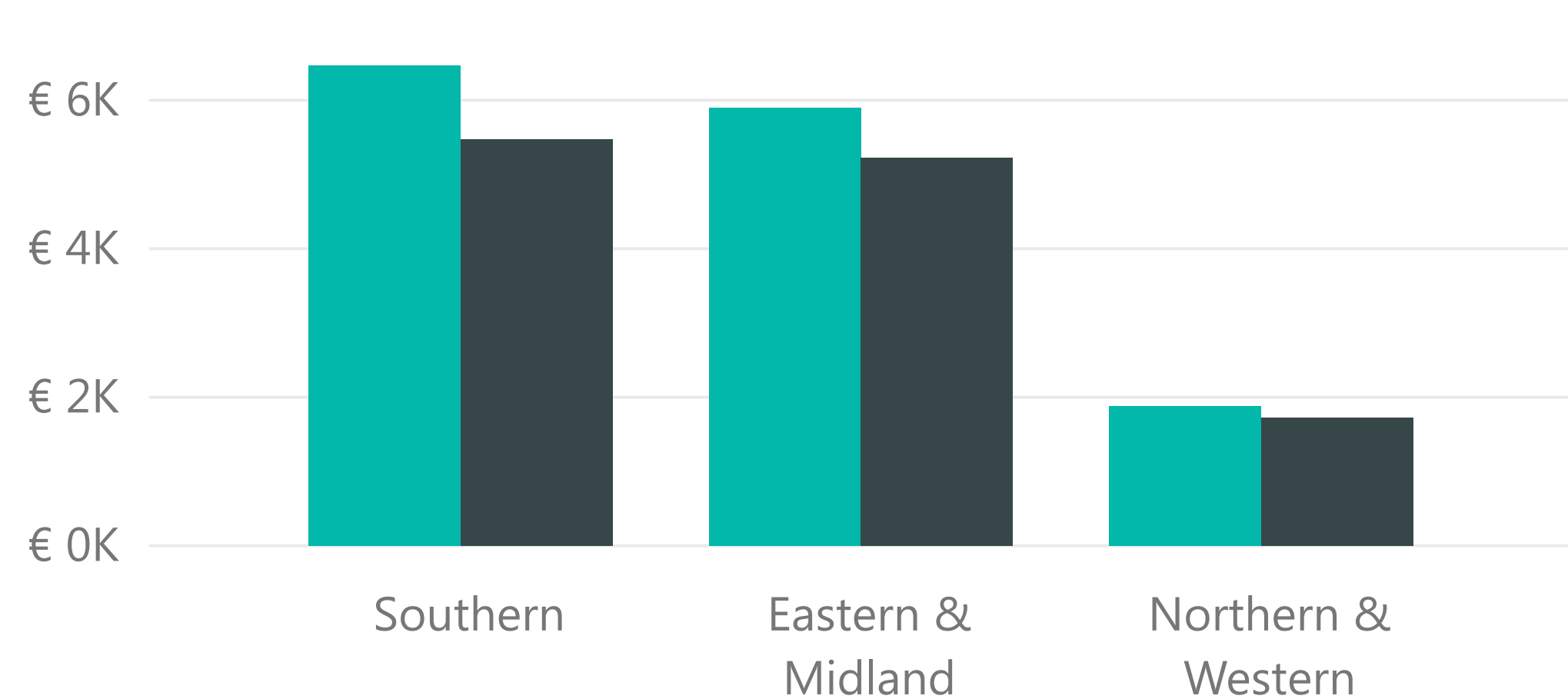
Cattle Farm Income 2019

● Family Farm Income ● Direct_Payments_Subs



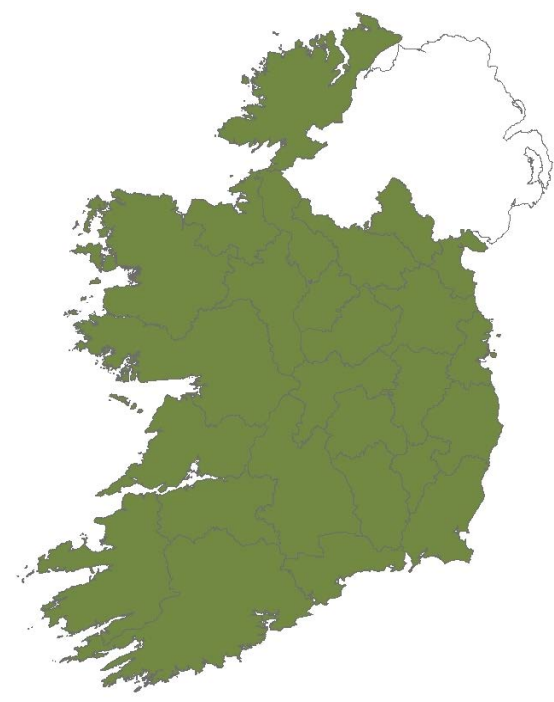
Gross New Investment 2019

● Gross_New_Investmnt ● Net_New_Investmnt



Farm Characteristics 2019

Region	Farmer Age	UAA	Suckler Cows	Livestock Units	Gross Output per ha	Direct Payments per ha	FFI per ha	Off farm job Holder %
Northern & Western	55.2	29.5	9.0	38.09	€ 1,376	€ 524	€ 411	52.0
Eastern & Midland	60.3	38.8	11.1	53.54	€ 1,404	€ 471	€ 334	36.0
Southern	62.4	41.2	9.8	51.91	€ 1,363	€ 487	€ 403	30.6



Sheep System Results National

FFI 2019 - € per farm

€ 14,604

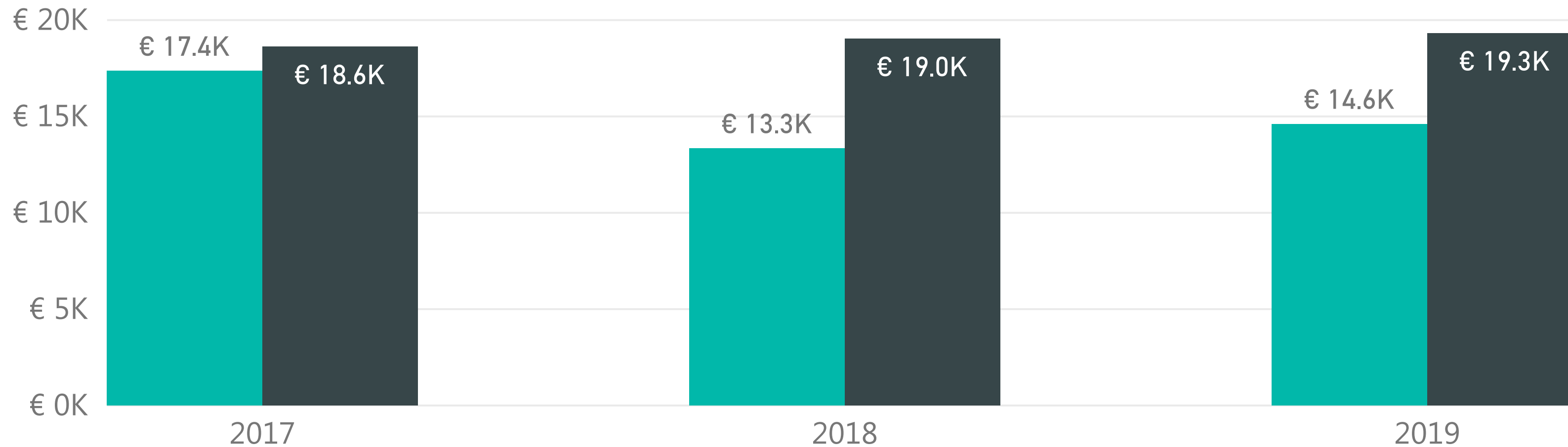


Income Drivers 2019

- Market output is down
- Direct payments +2%
- Overall Costs down 6 %
- Feed down 18%
- Fertiliser expenditure down 10%
- FFI up 9%

Sheep Farm Income 2017 - 2019

● Family Farm Income ● Total Direct Payments



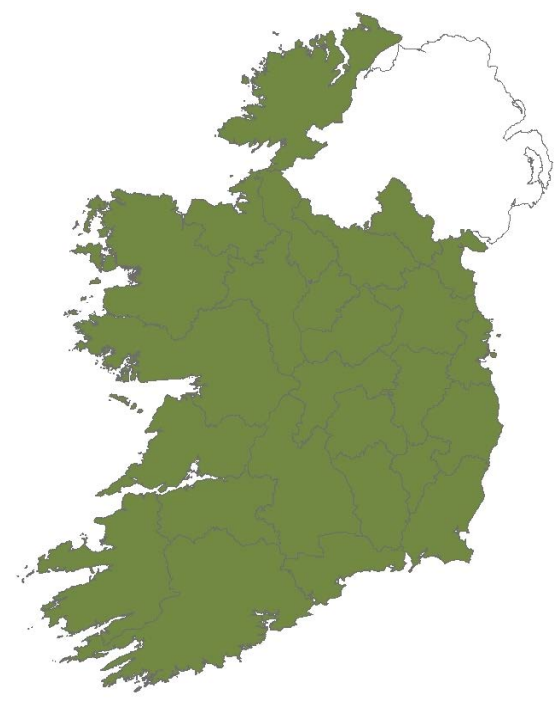
Farm Characteristics 2017 - 2019

Year	Farmer Age	Family Labour	Area_Owned	UAA	FFI per ha	Livestock Units	Ewes
2017	58.4	1.08	41.6	47.3	€ 367	54.64	133.0
2018	59.6	1.06	42.7	48.2	€ 277	52.94	127.2
2019	58.9	1.03	42.0	47.0	€ 311	52.11	132.7

Region

National





Tillage System Results National

FFI 2019 - € per farm

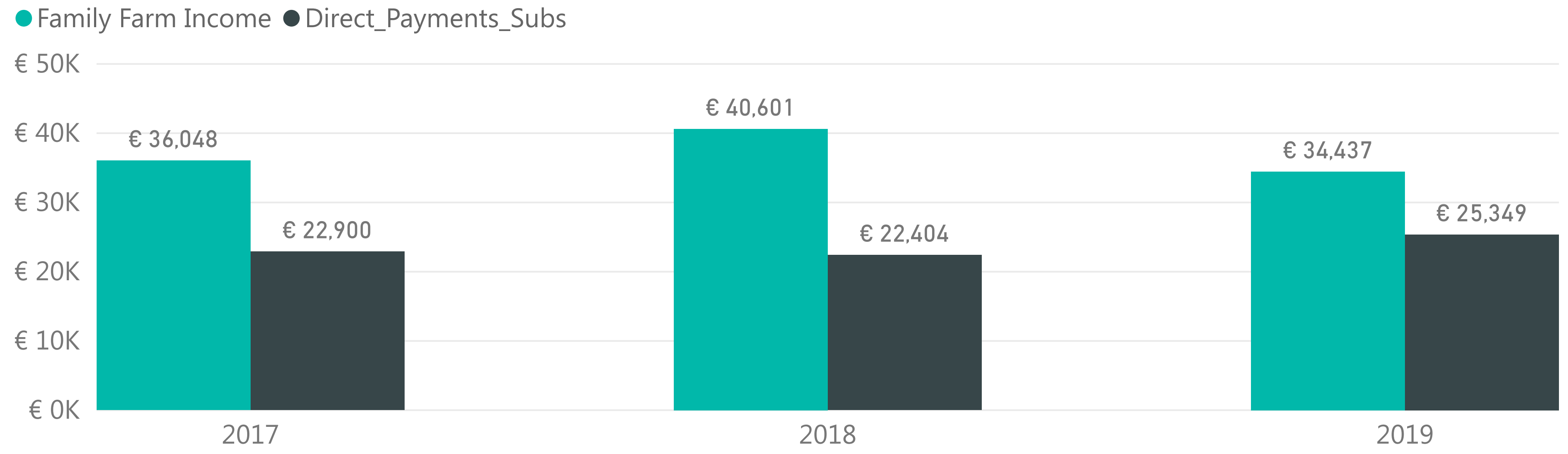
€ 34,437



Income Drivers

- Yields up
- Prices down
- Input costs up
- FFI down 15%

Tillage Farm Income 2017 - 2019

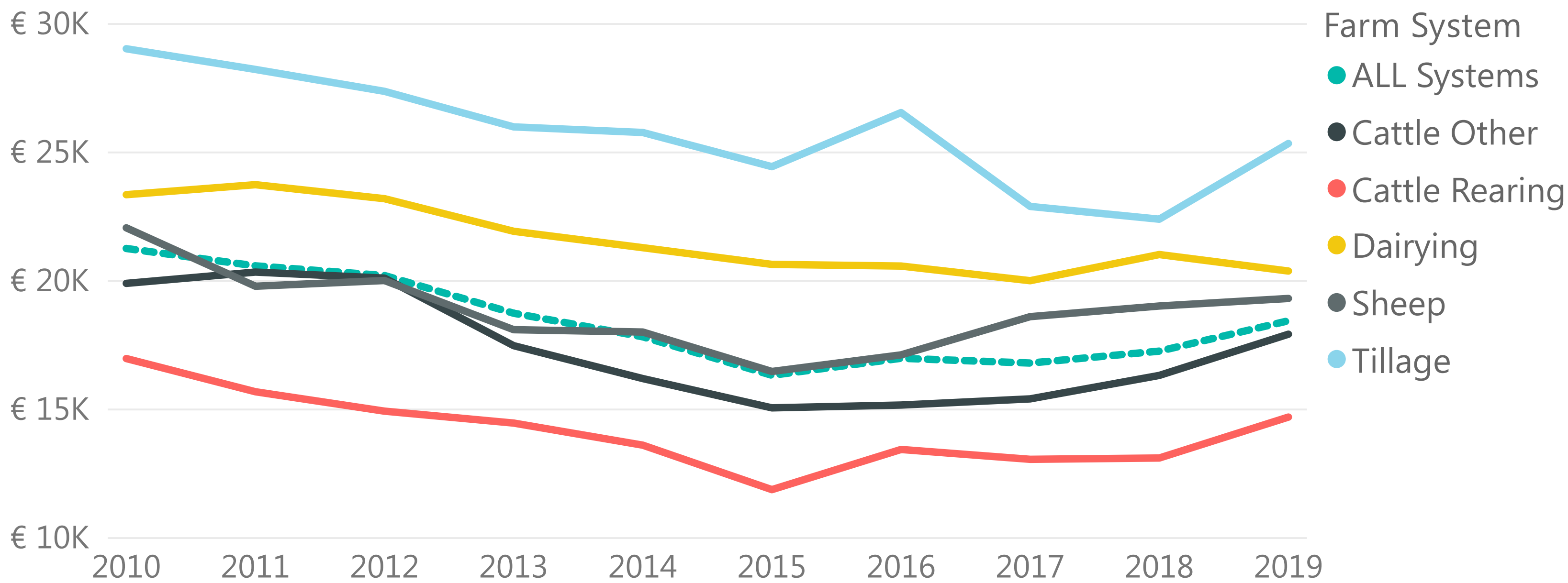


Farm Characteristics 2017 - 2019

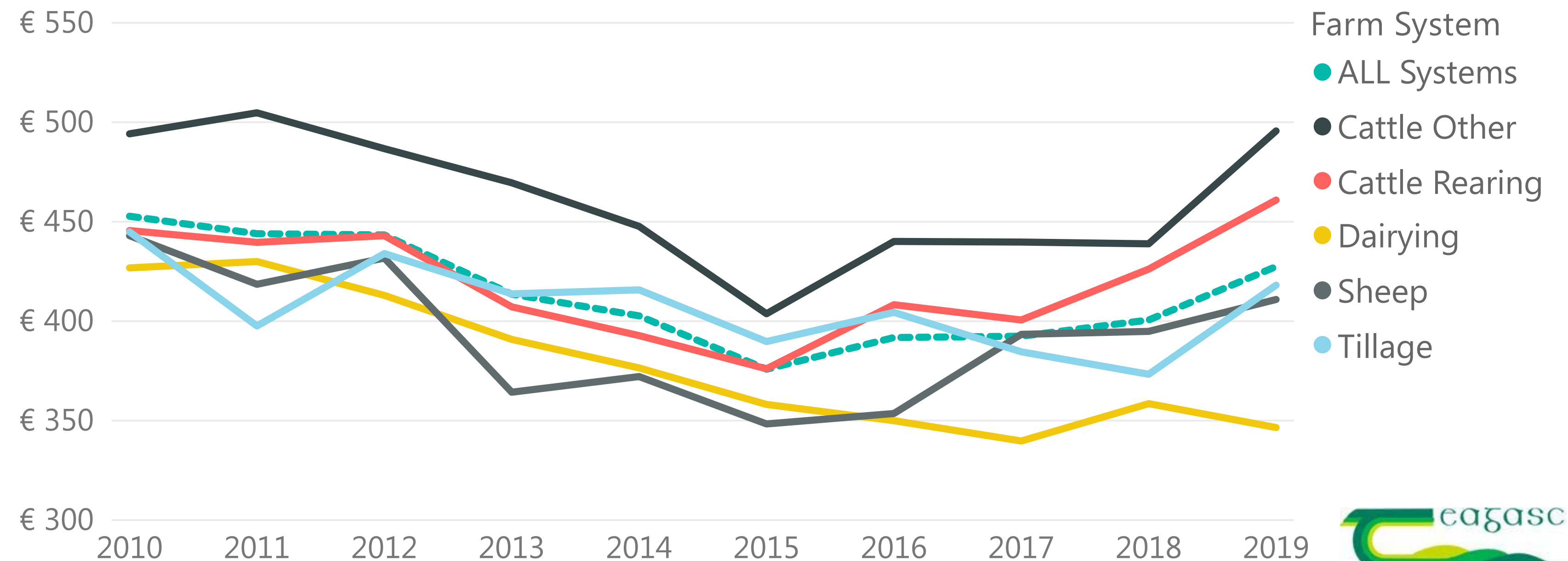
Year	Farmer Age	Area_Owned	UAA	FFI per ha	Tillage Area	Cereal Area	Total Livestock Units	Gross_Margin_ha
2017	59.3	52.1	59.5	€ 605	36.49	31.57	31.61	€ 1,176
2018	60.2	49.5	60.0	€ 677	36.85	32.47	32.40	€ 1,285
2019	58.2	51.2	60.6	€ 568	37.05	33.06	34.29	€ 1,235



Direct Payments by Year and Farm System 2010 - 2019



Direct Payments per ha by Year and Farm System 2010 - 2019

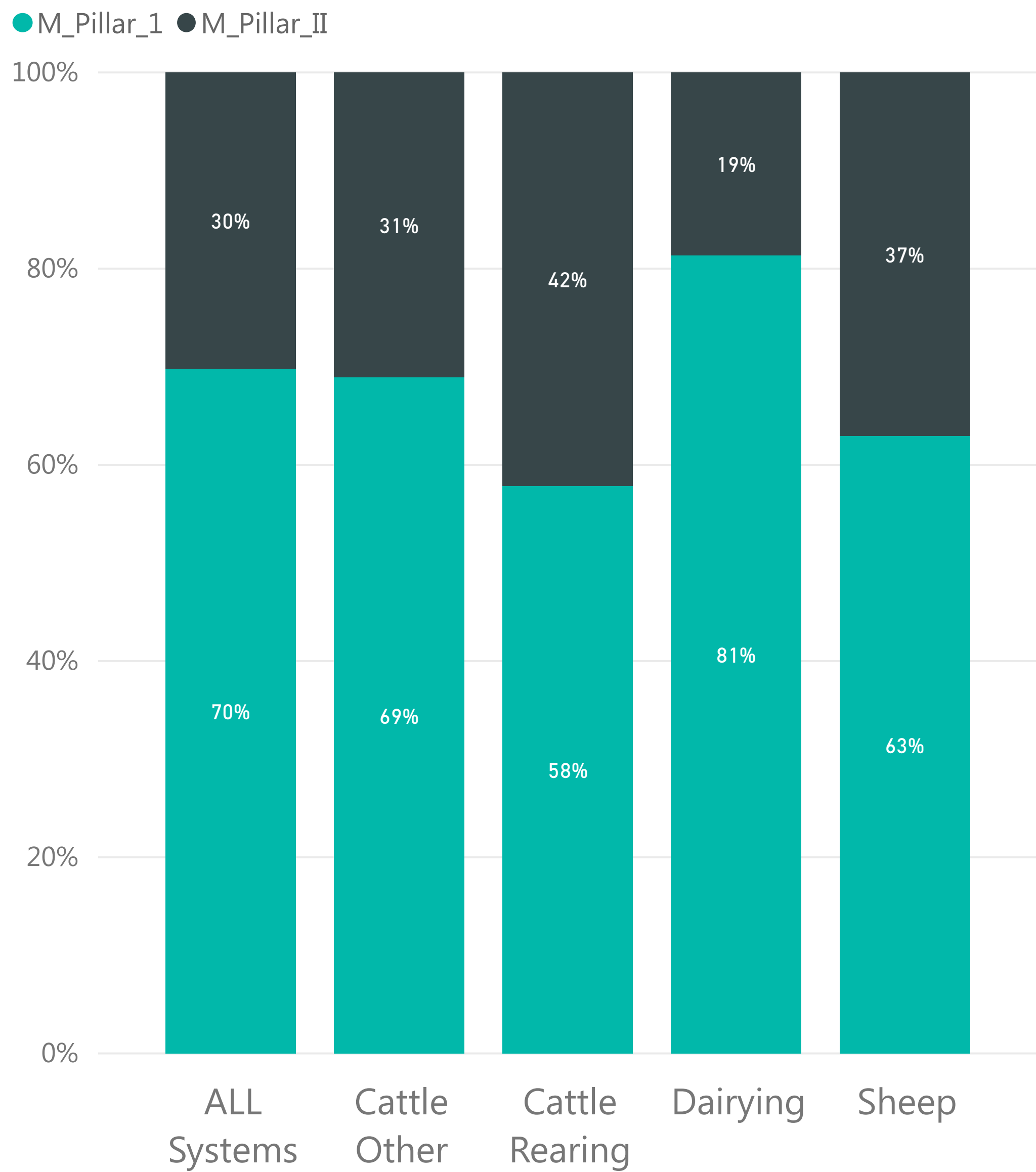


Region

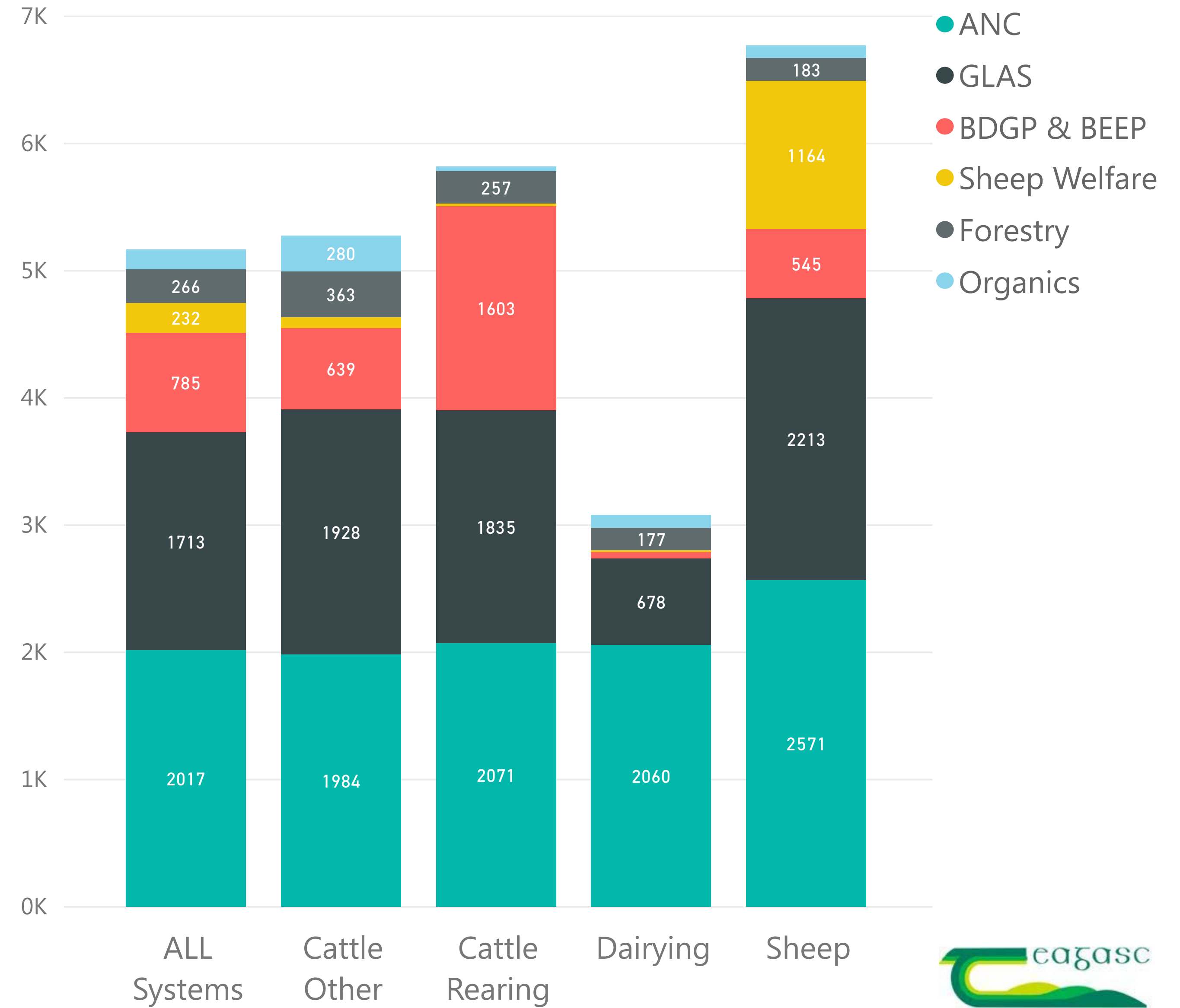
National



Pillar_1 and Pillar_II Payments by Farm System 2019



Pillar II Payment Disaggregation by Farm System 2019



2019 Selected Schemes - % participation & Average Payments for participating famers

Select Farm System

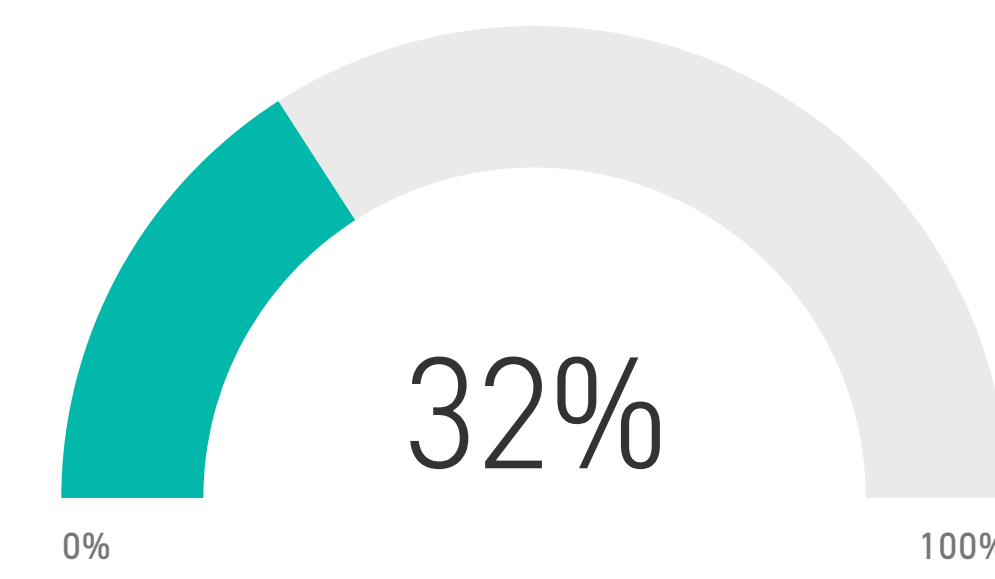
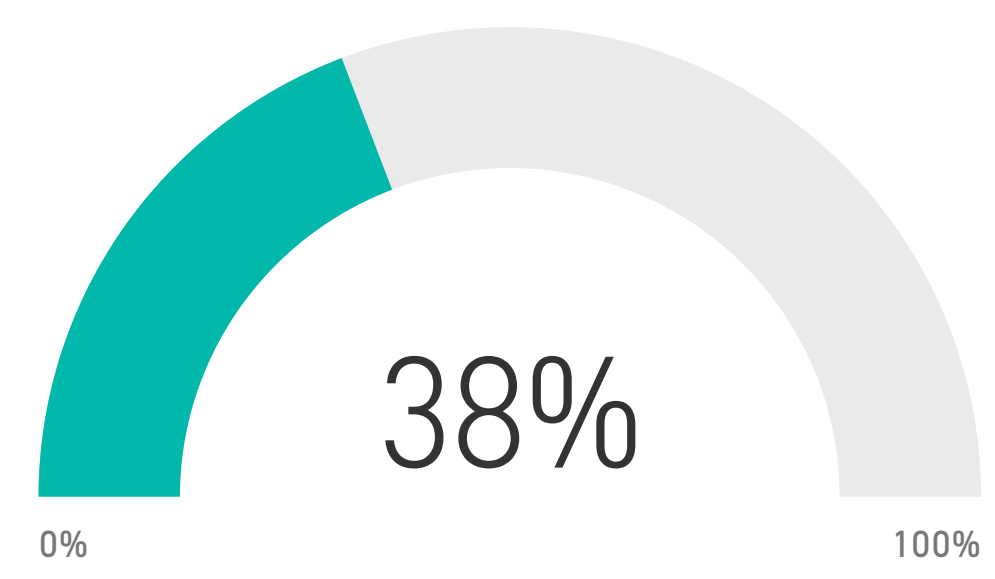
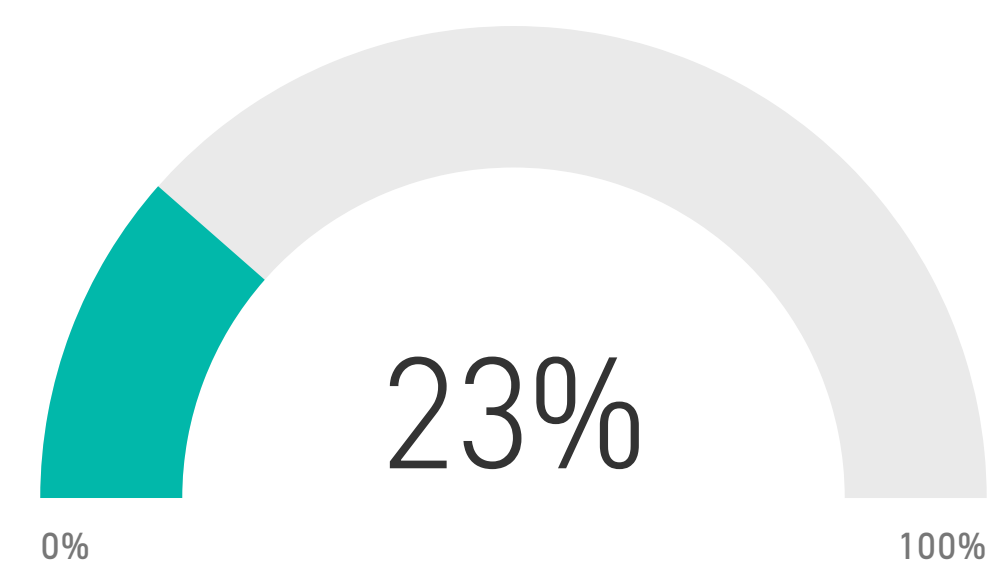
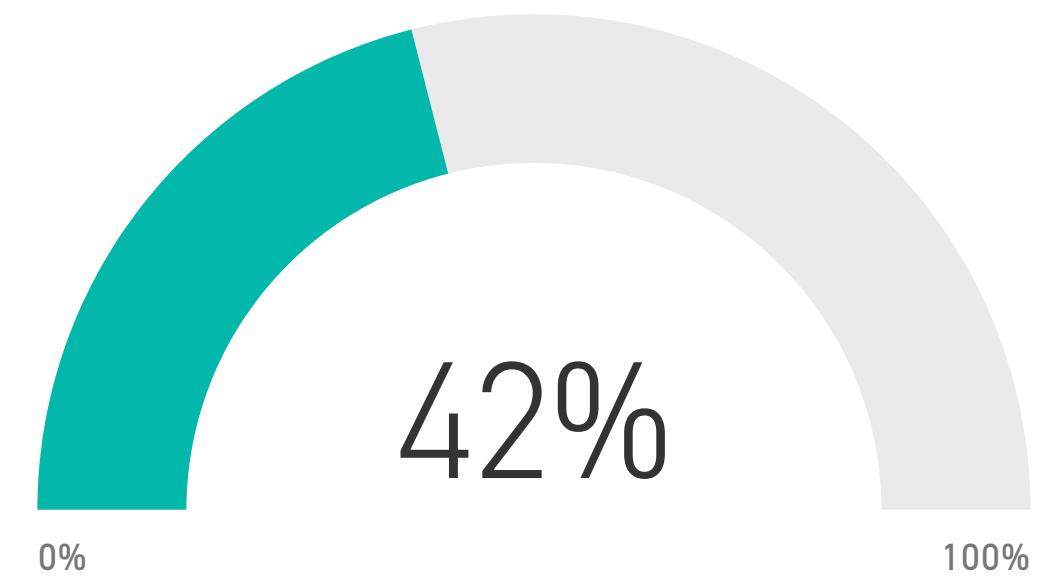
- ALL Systems
- Cattle Other
- Cattle Rearing
- Dairying
- Sheep
- Tillage

BEAM Scheme Participatio...

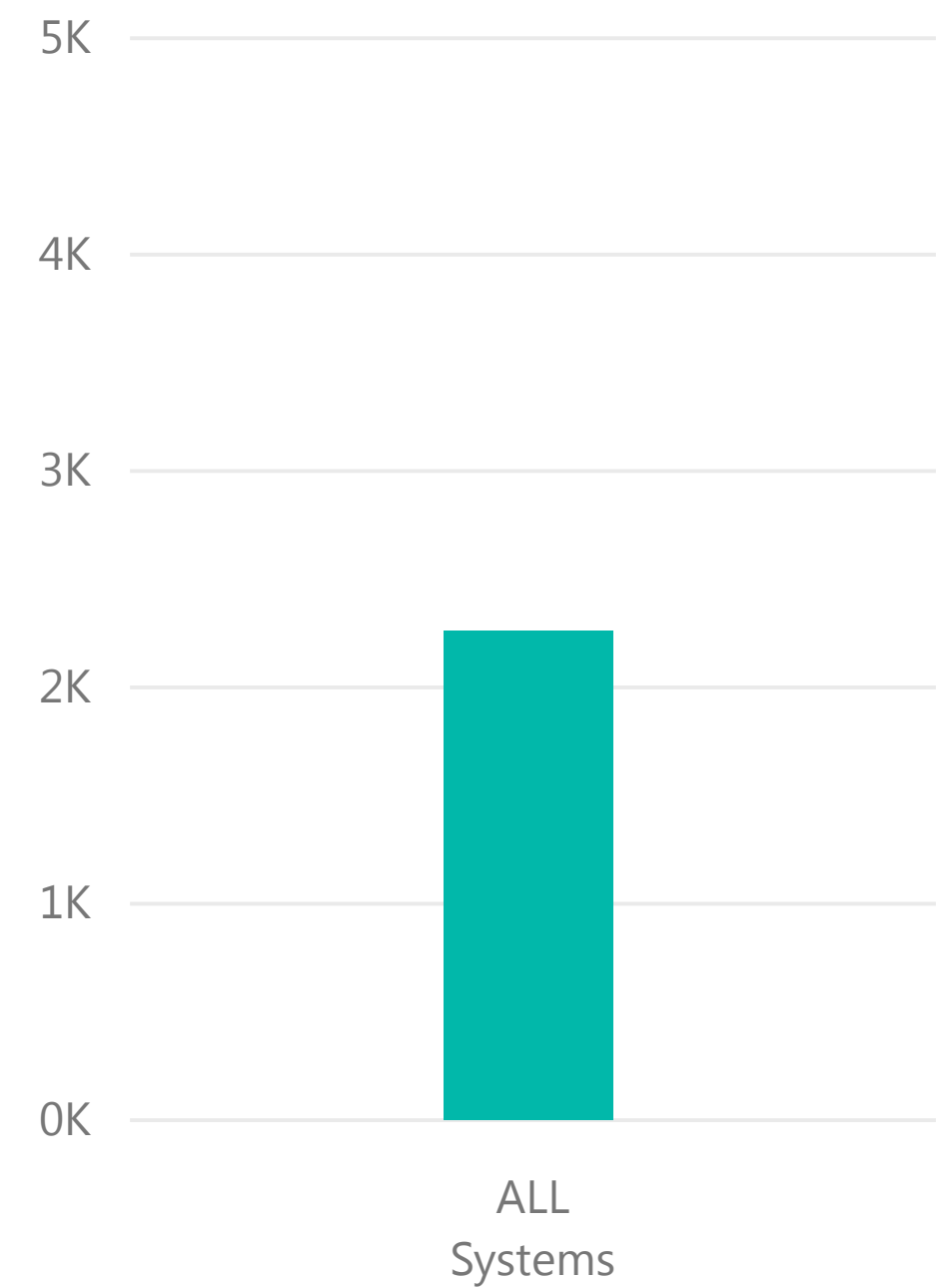
BEEP Scheme Participatio...

GLAS Scheme Participatio...

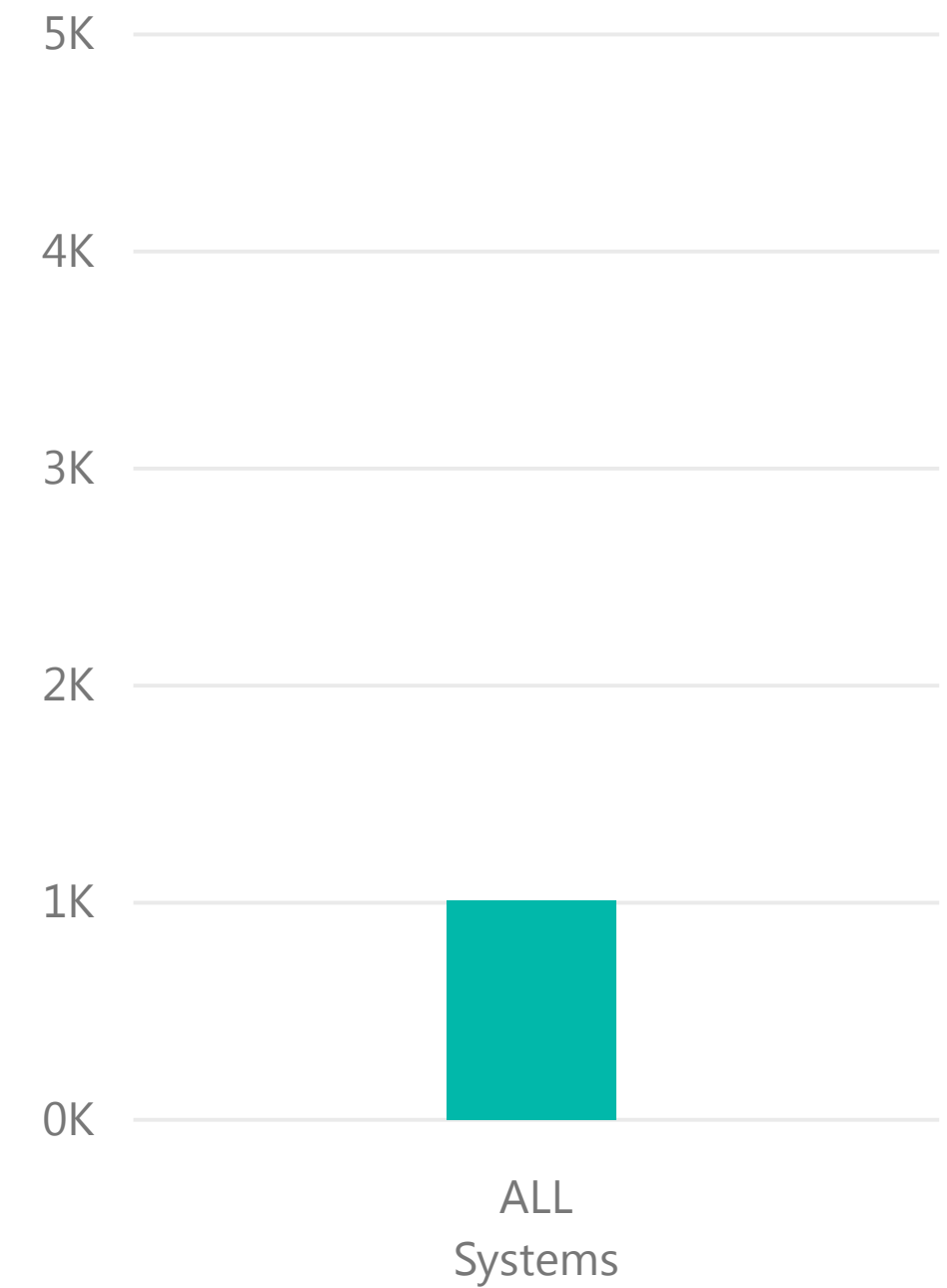
BDGP Scheme Participati...



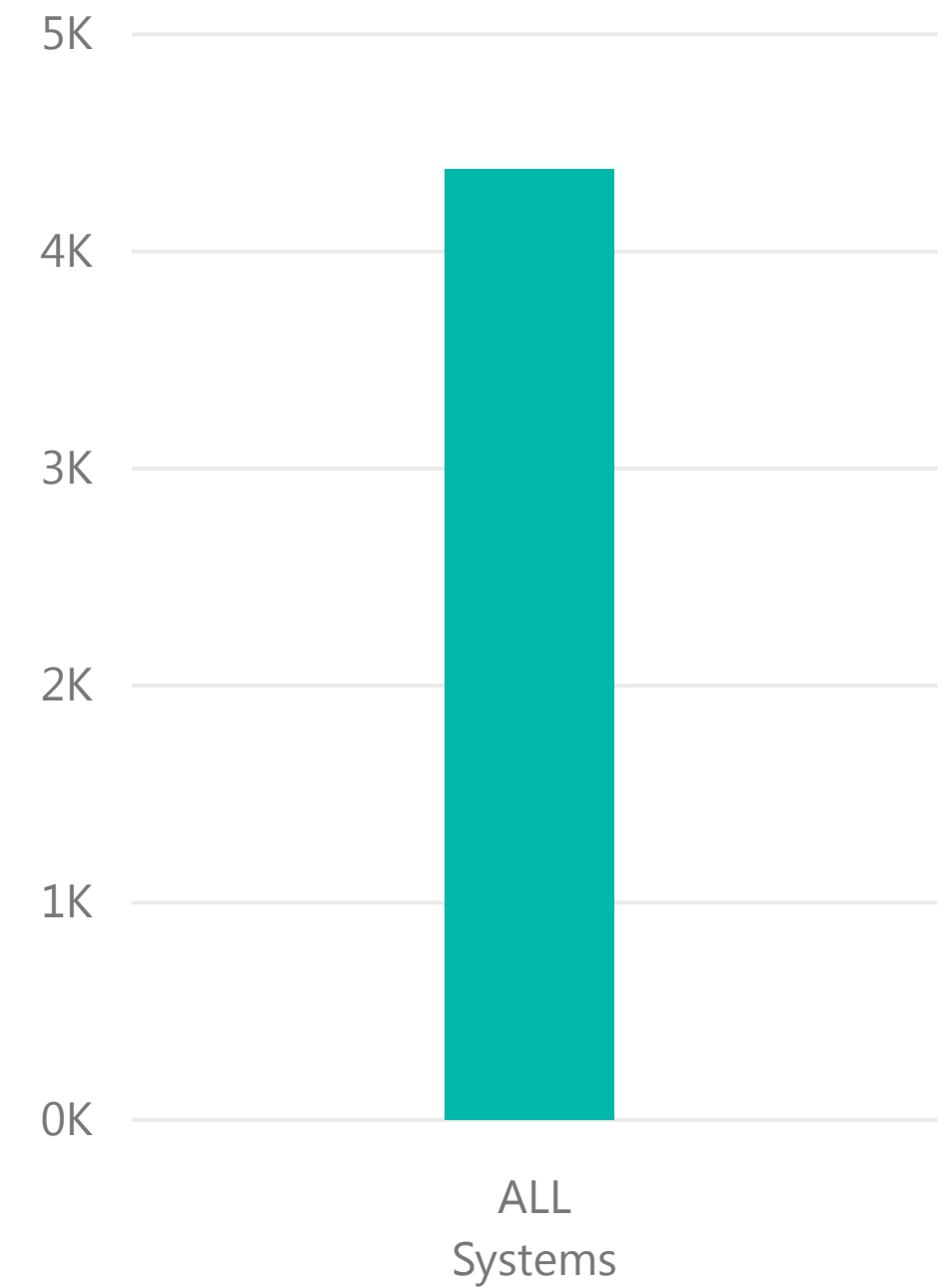
BEAM Average payment €



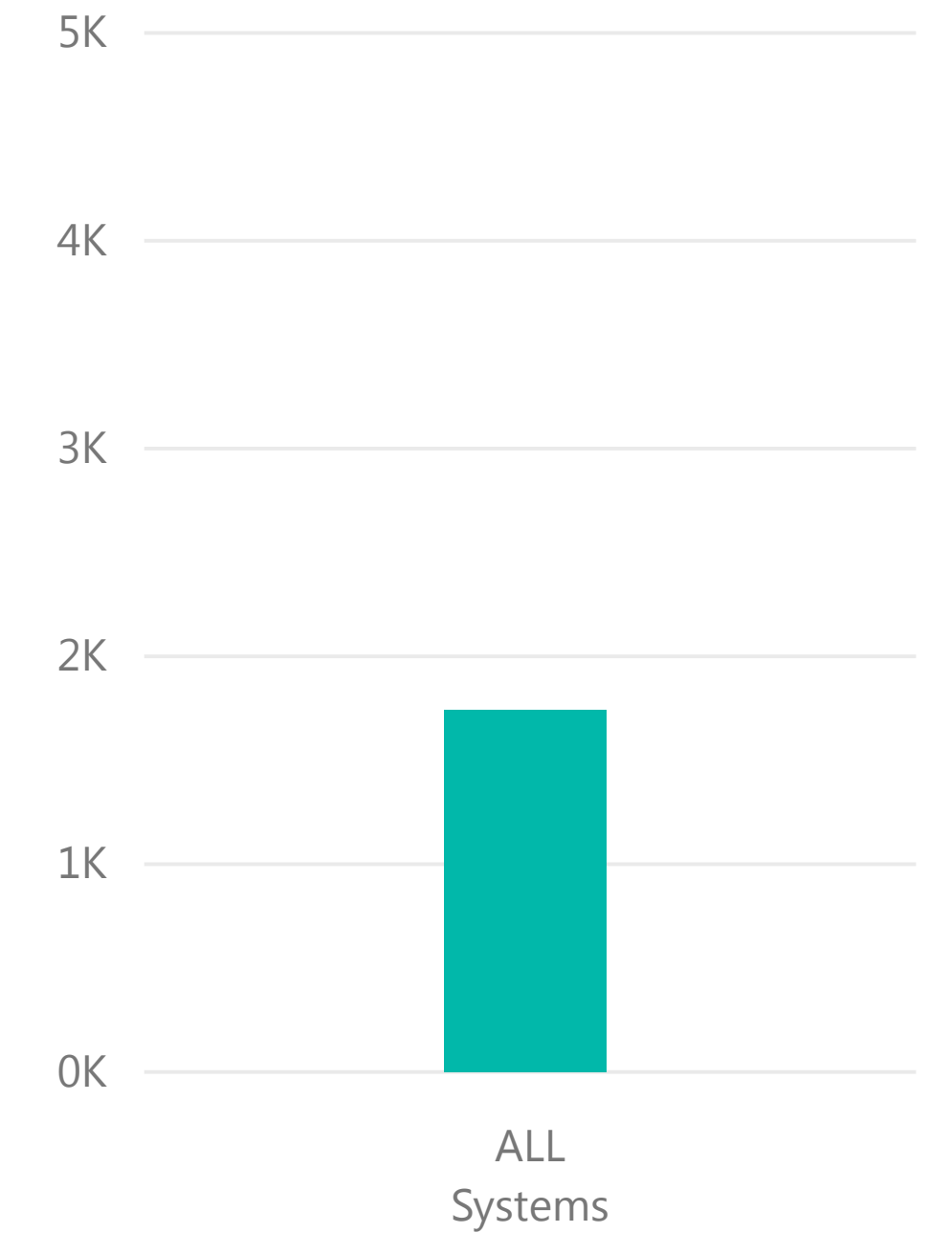
BEEP Average payment €



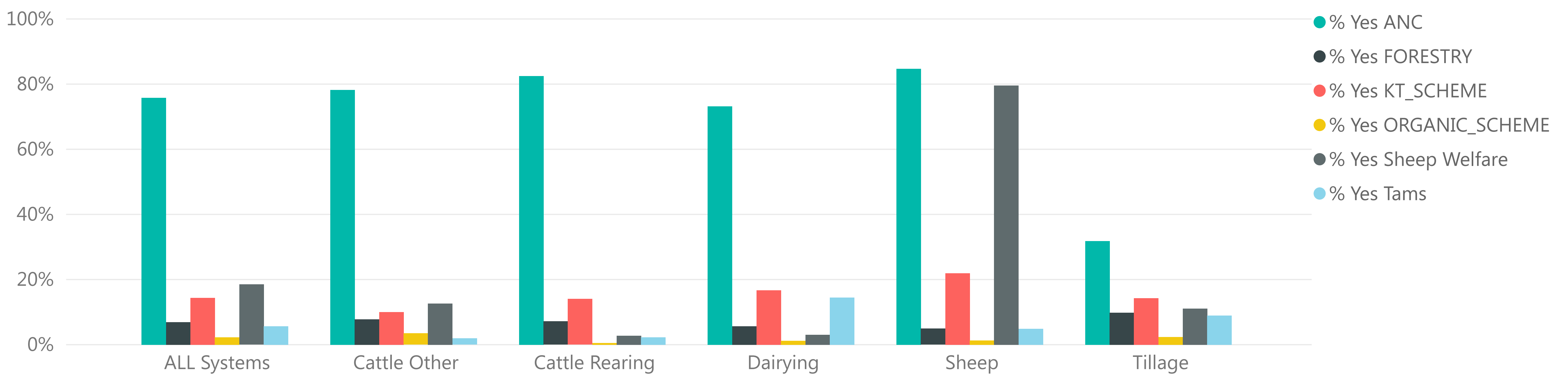
GLAS Average payment €



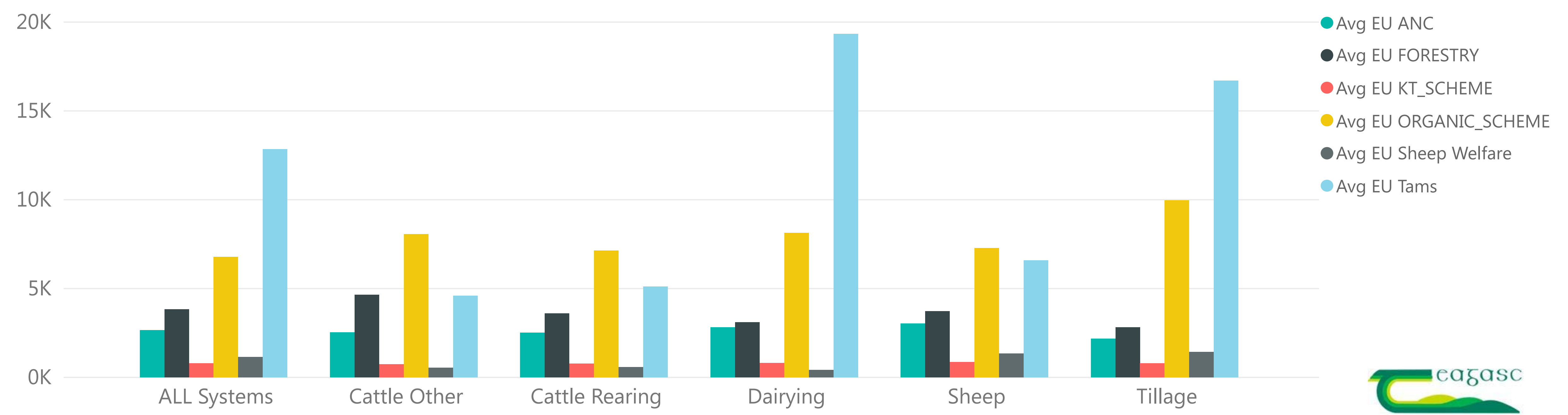
BDGP Average payment €



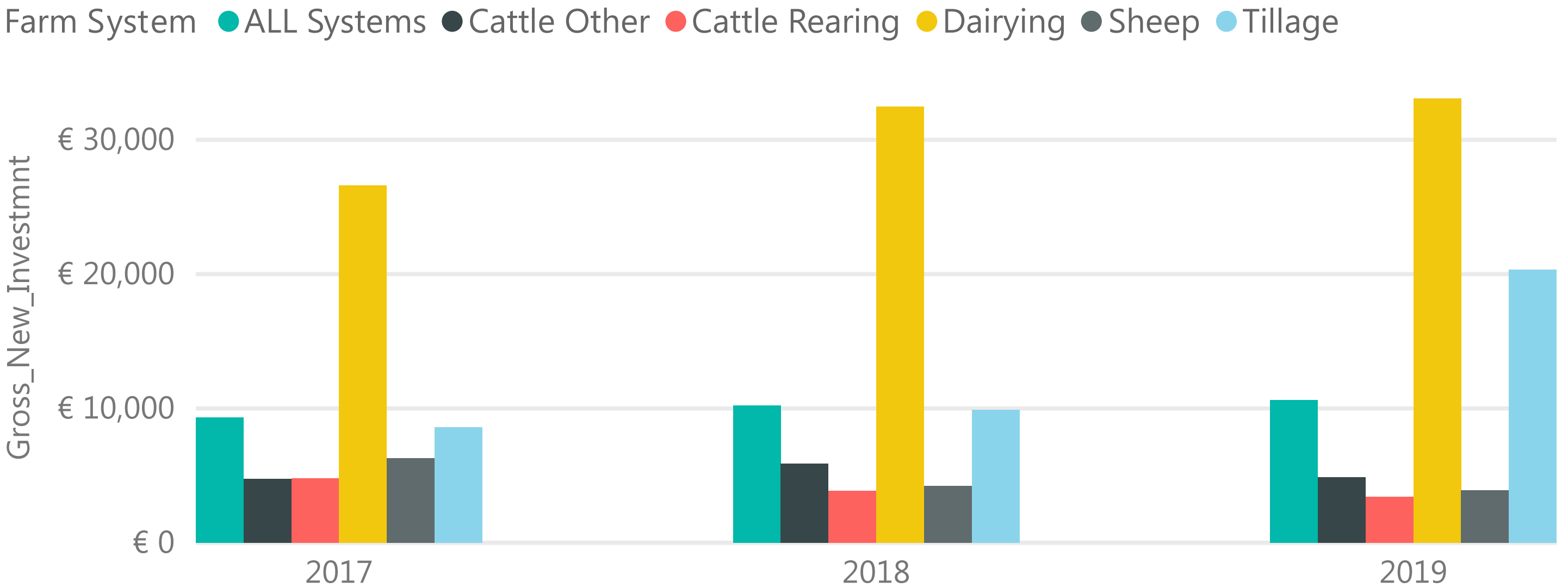
Scheme Participation by Farm System 2019



Average payment per farm by scheme participation 2019



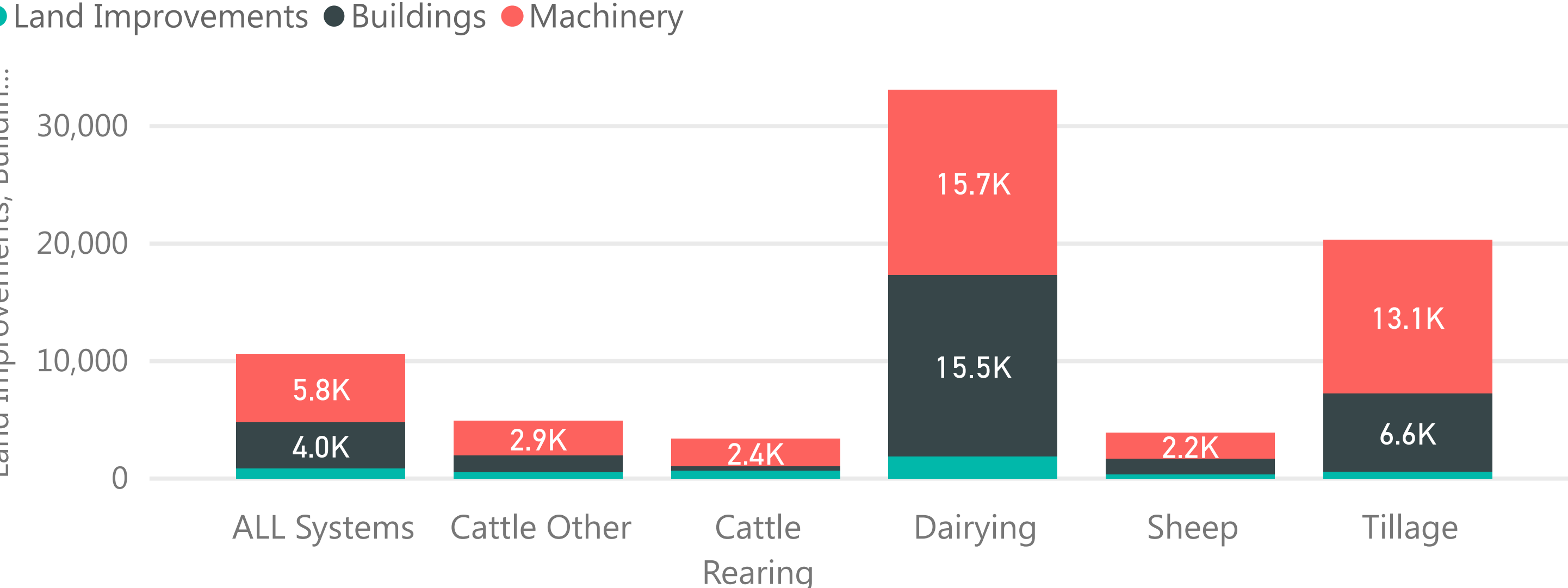
Gross Farm Investment by Farm System € per farm 2019



Investment Subsidies Received € per farm 2019

Farm System	Capital Grants TAMS
ALL Systems	692
Cattle Other	89
Cattle Rearing	23
Dairying	2796
Mixed Livestock	1405
Sheep	273
Tillage	1493

Type of Farm Investment € per farm 2019



Investment 2019

On-farm investment up 2% to €983 million.

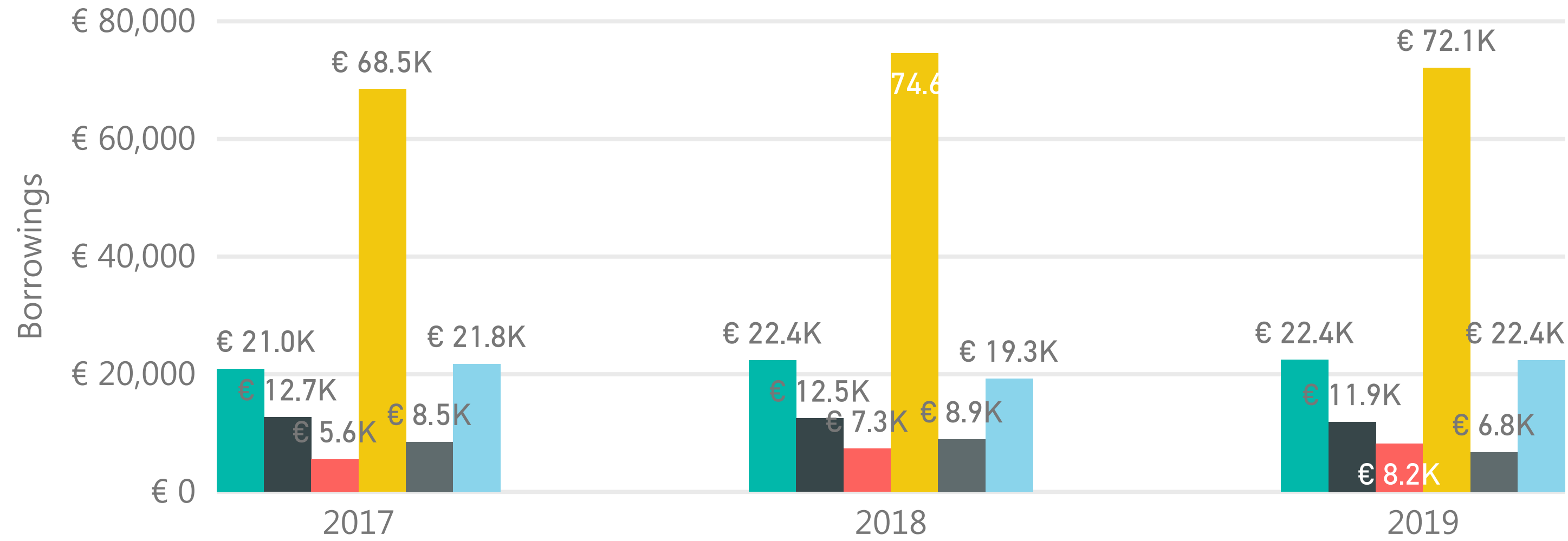
Over half this invested on Dairy farms

Average Investment €33,091 per Dairy farm in 2019



Farm Debt by Farm System € per farm 2019

Farm System ● ALL Systems ● Cattle Other ● Cattle Rearing ● Dairying ● Sheep ● Tillage



Farm Related Debt 2019

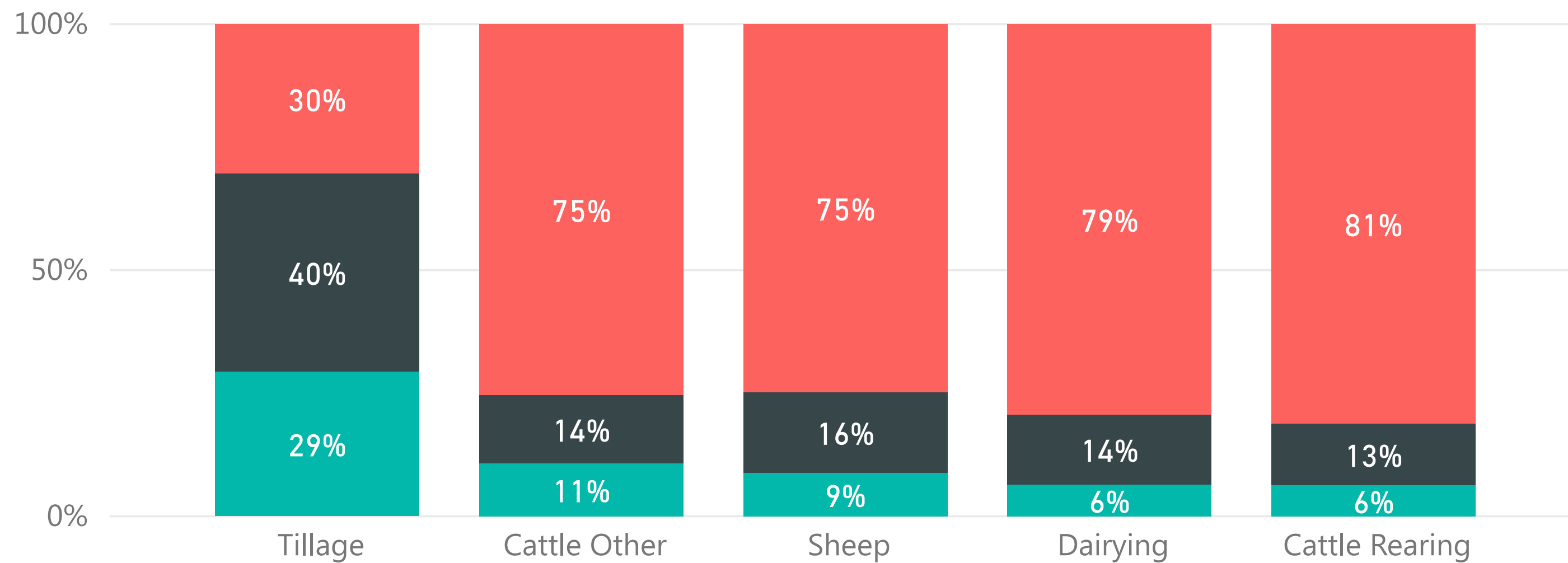
Average Debt level unchanged €22,444

2/3rds of Farms have no farm related debt

Large variation within Farm Systems

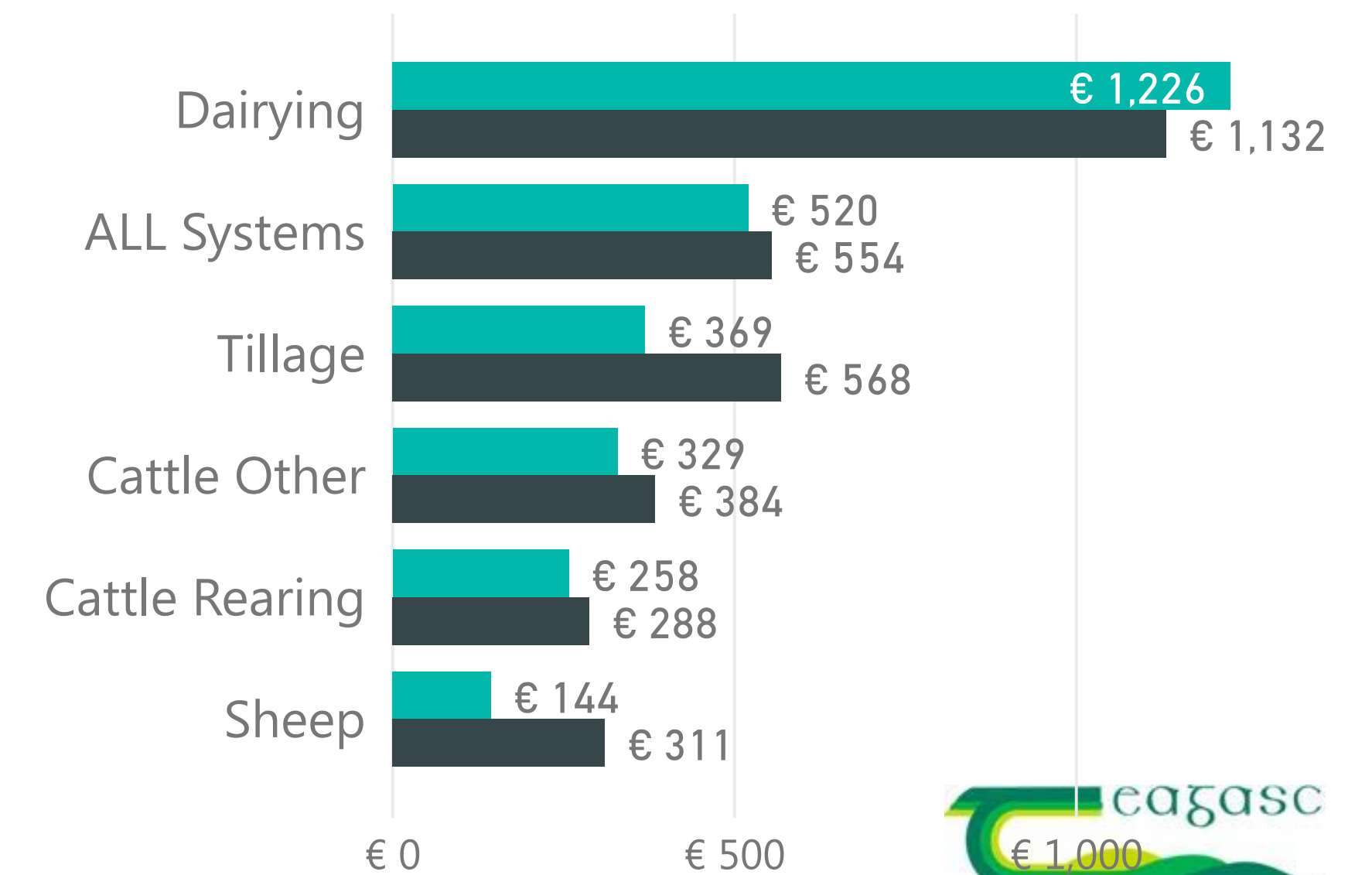
Farm Debt Type 2019

● Short Term ● Finance Company ● Long Medium Term Loans

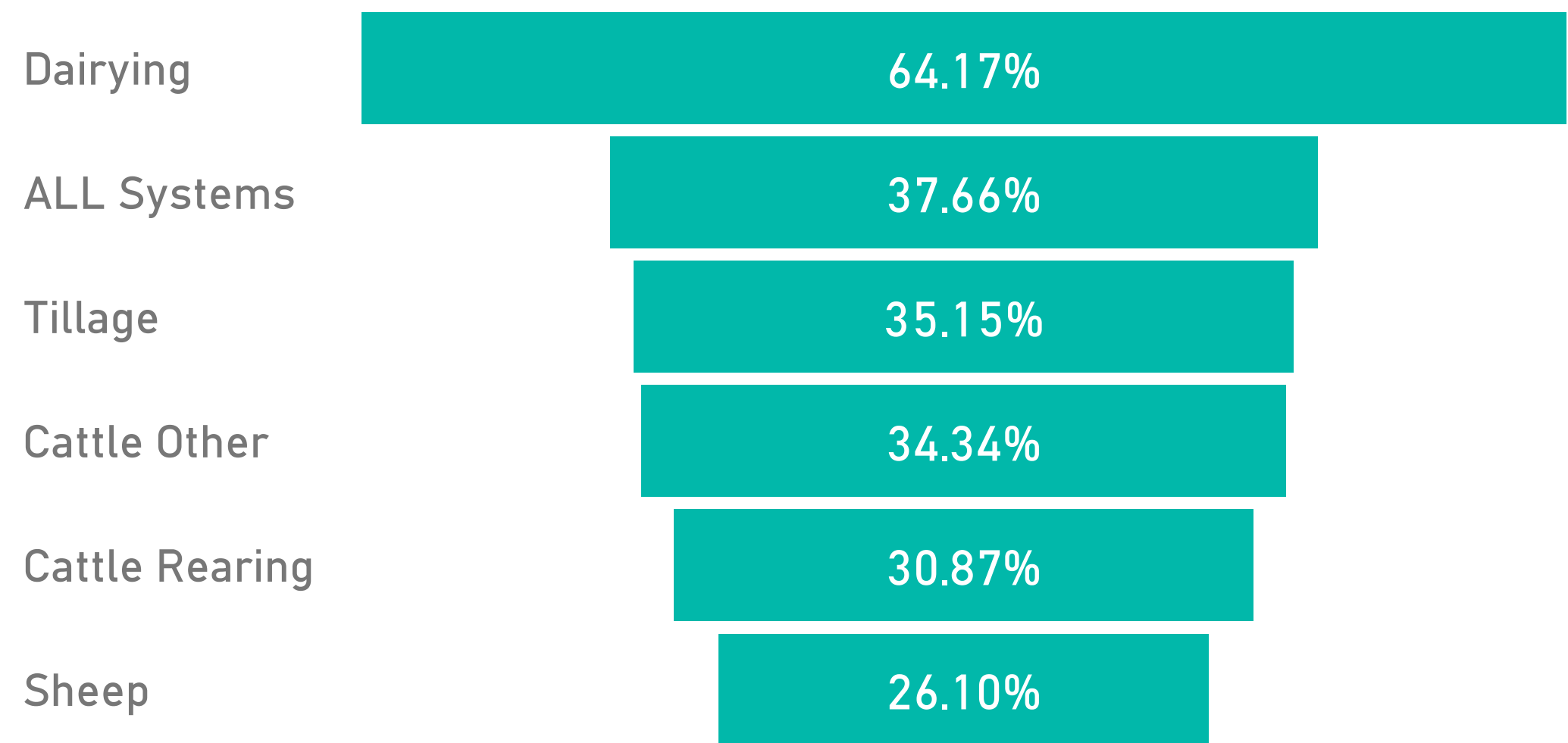


Average Farm Debt € per ha 2019

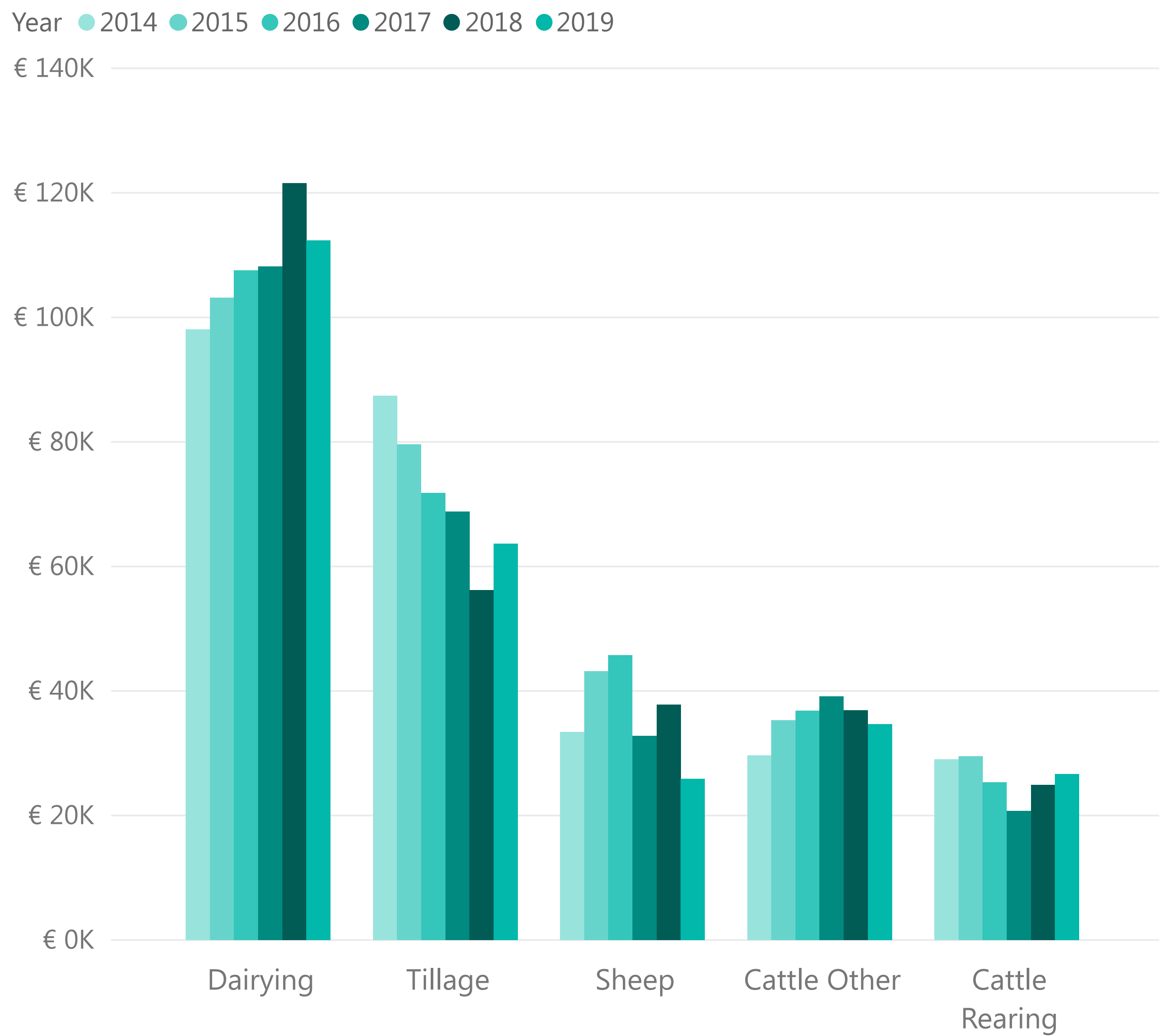
● Loan Amount ● FFI



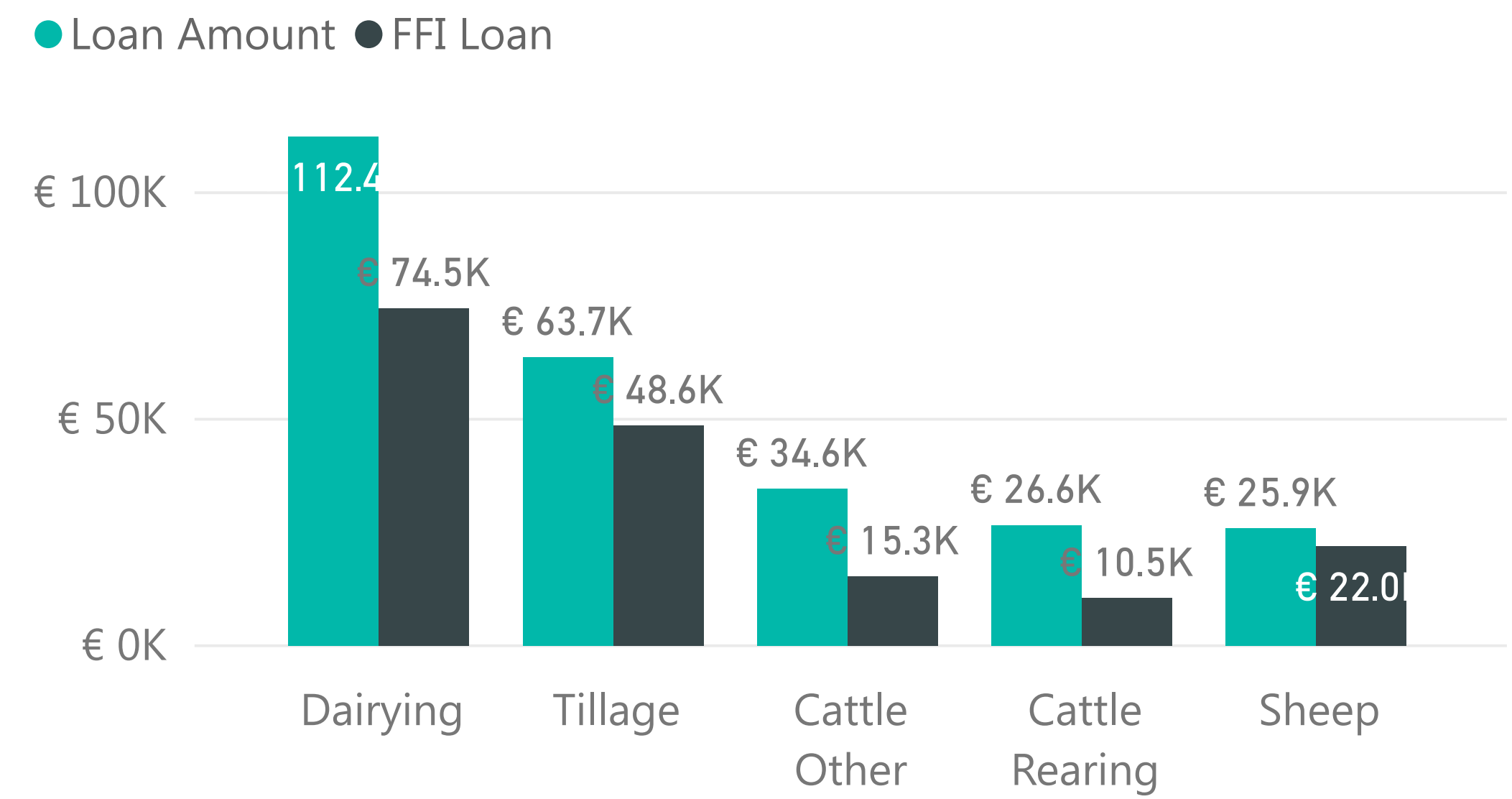
Farm With Debt % Population 2019



Farms With Debt - Average Borrowings € per farm (2014-2019)



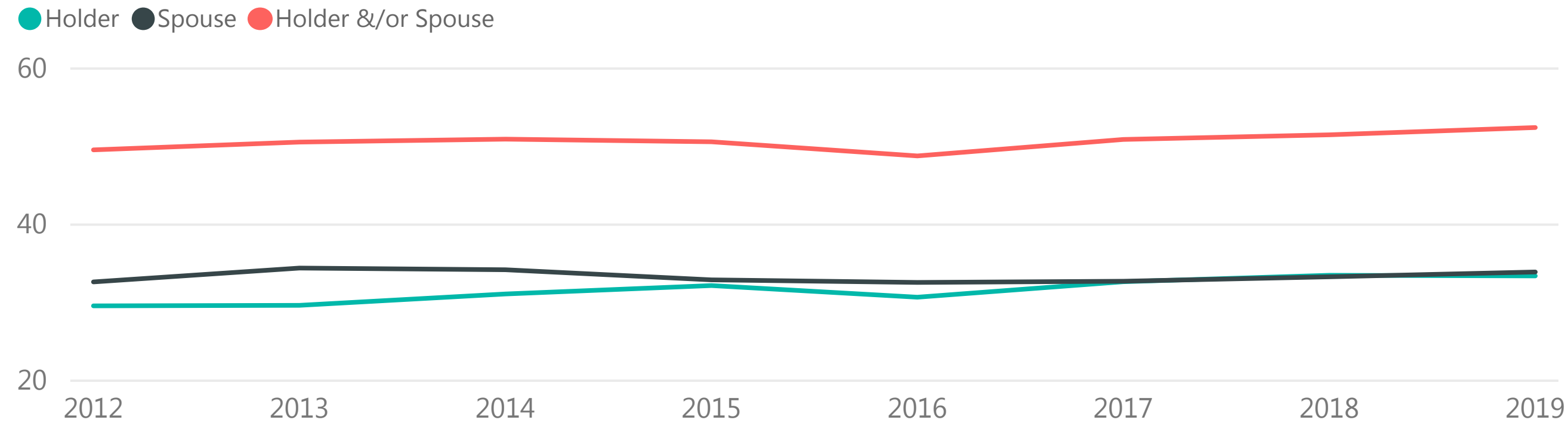
Farms With Debt € per farm & FFI 2019



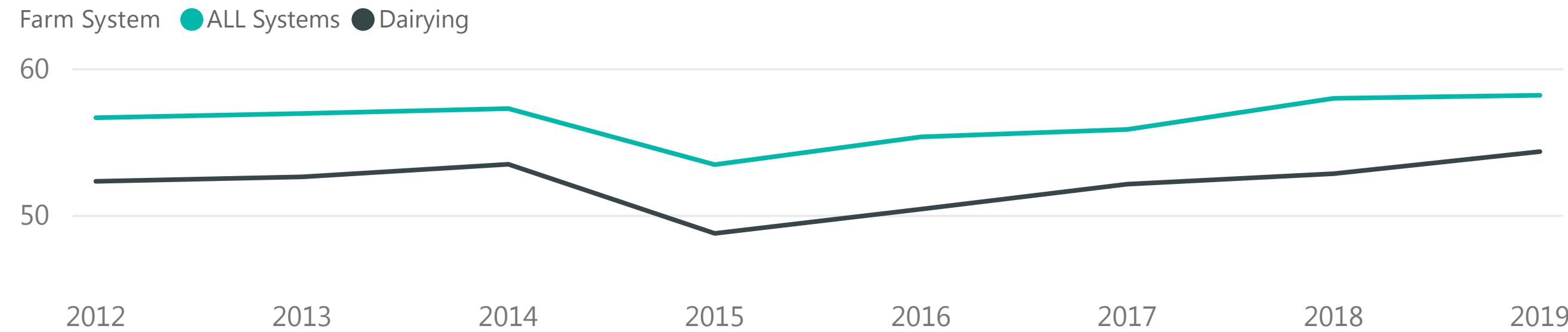
Selected Farm Demographics



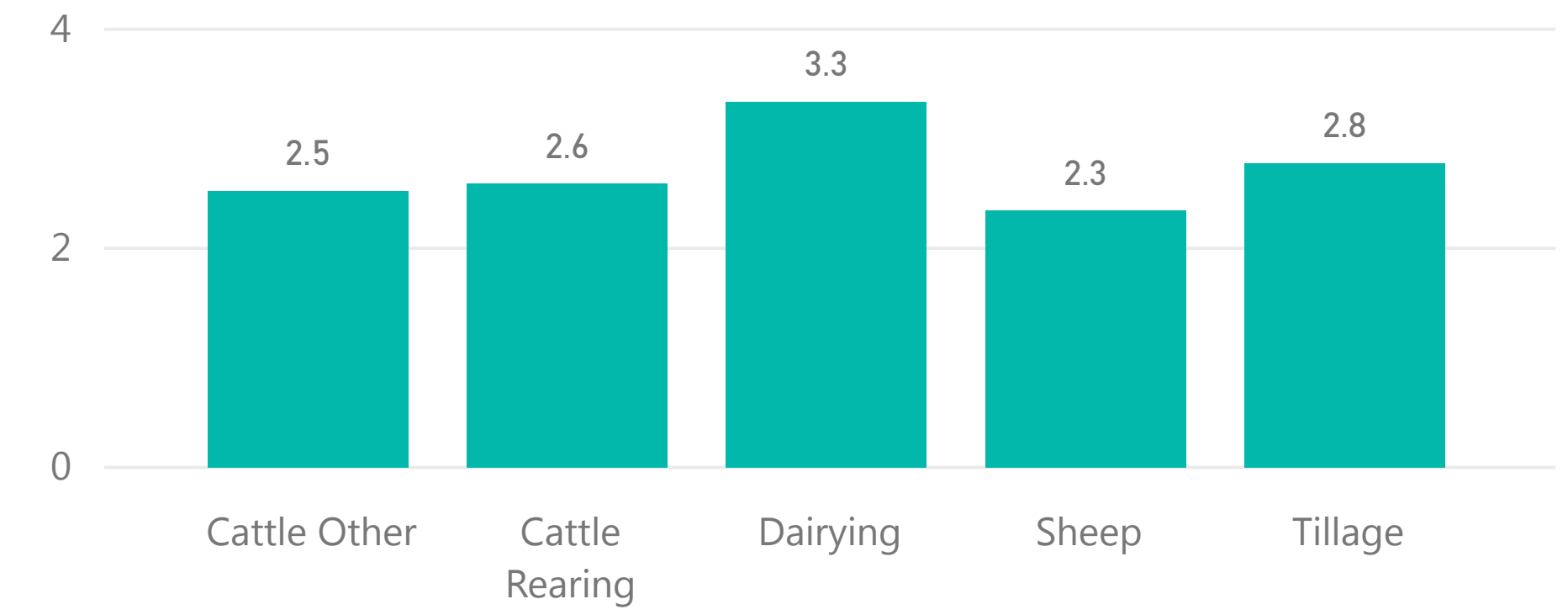
% Off-Farm employment 2012 - 2019



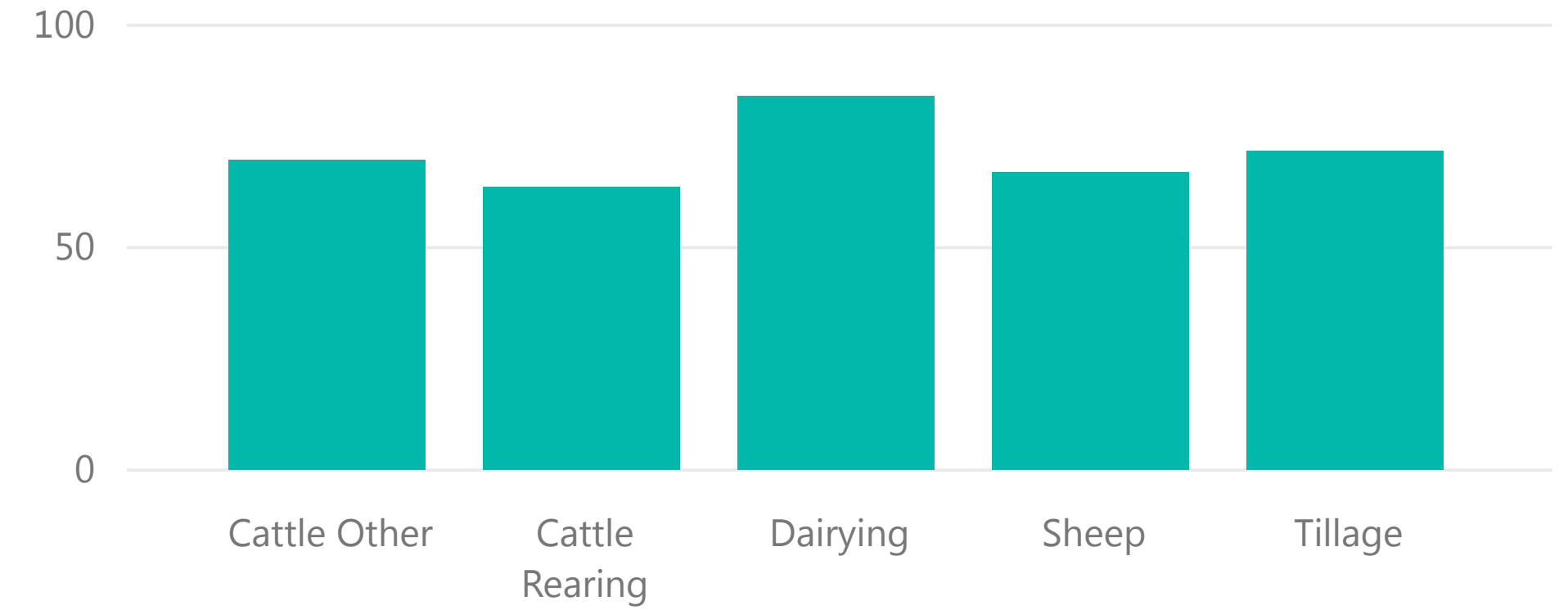
Average Farmer Age 2012 - 2019



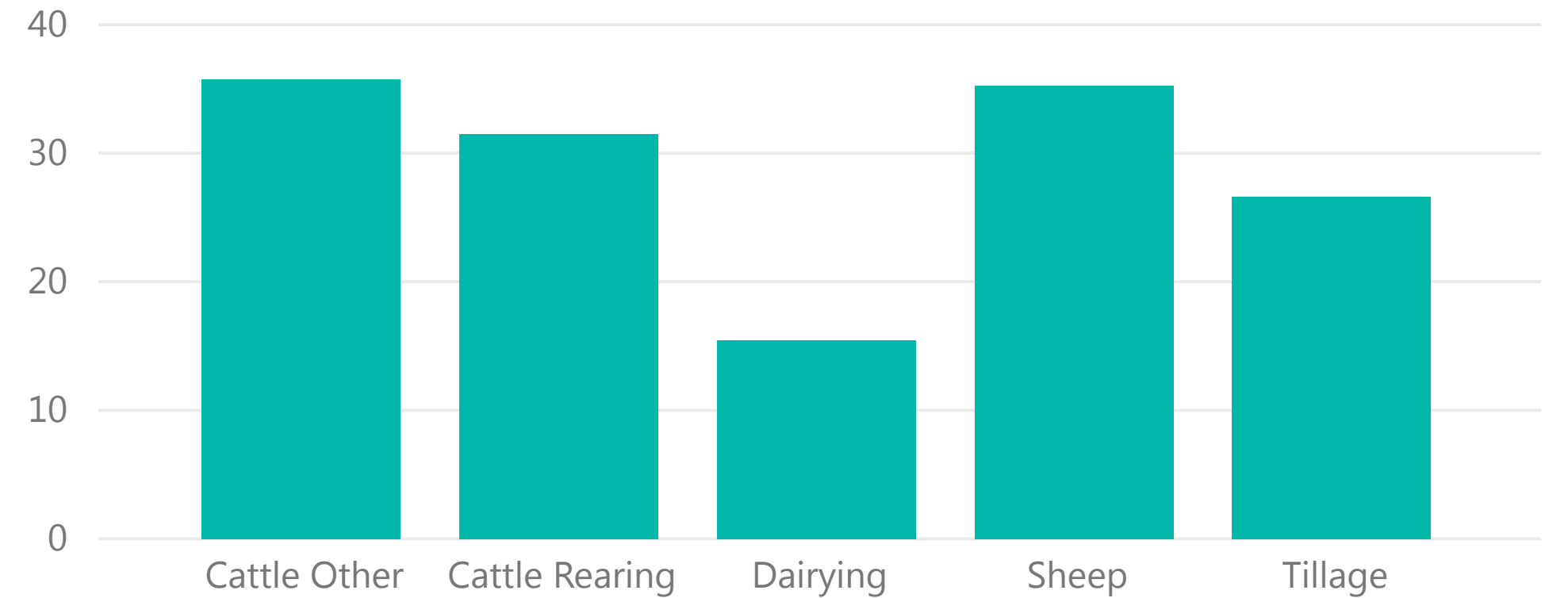
Household Size 2019



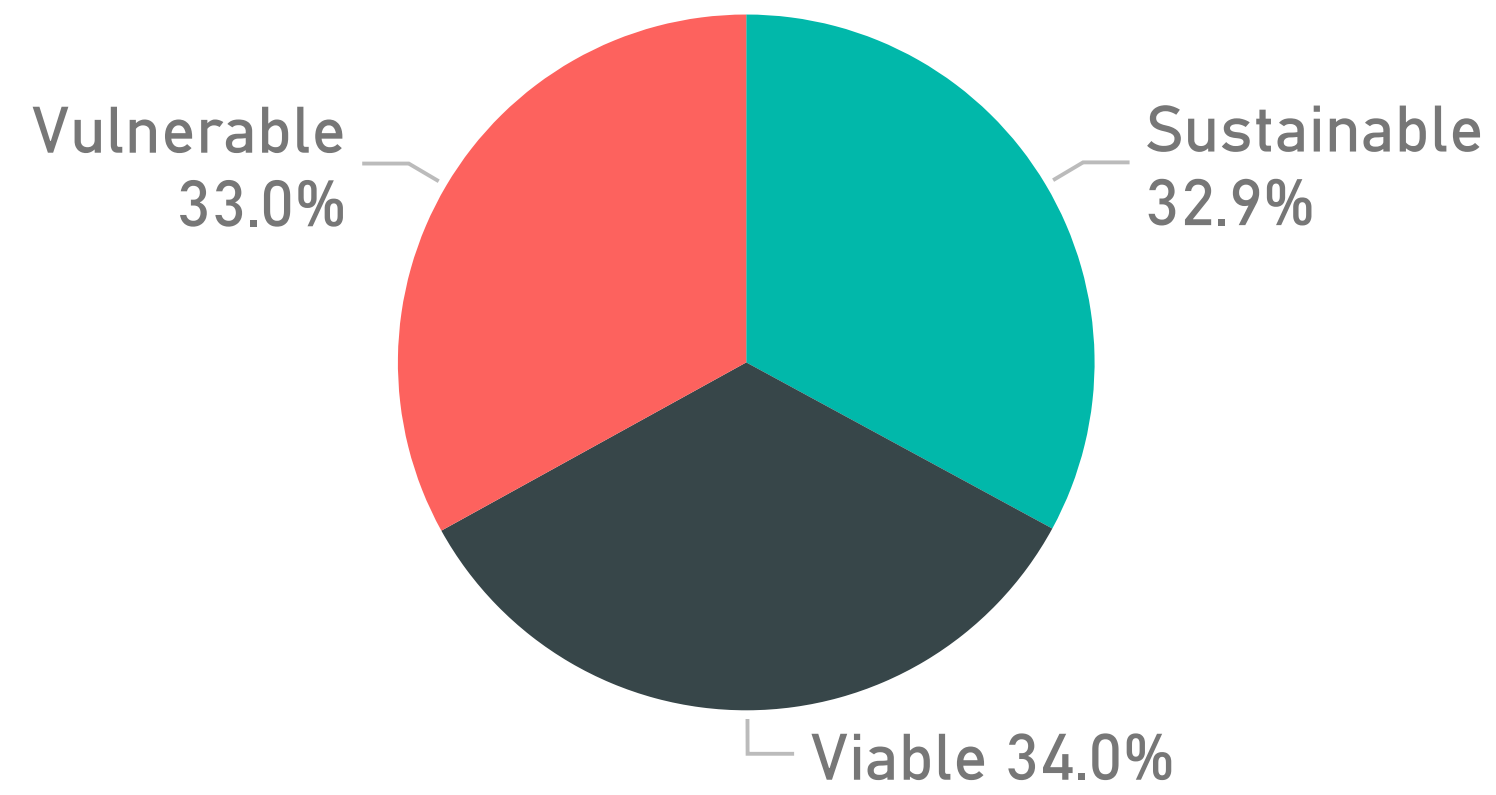
% Holder that are Married 2019



% Farms Holder/Spouse in receipt of pension 2019



Farm Viability 2019



Viable A farm business is viable if the farm income can remunerate family labour at the minimum agricultural wage and provide a 5% return on the capital invested in non-land assets.

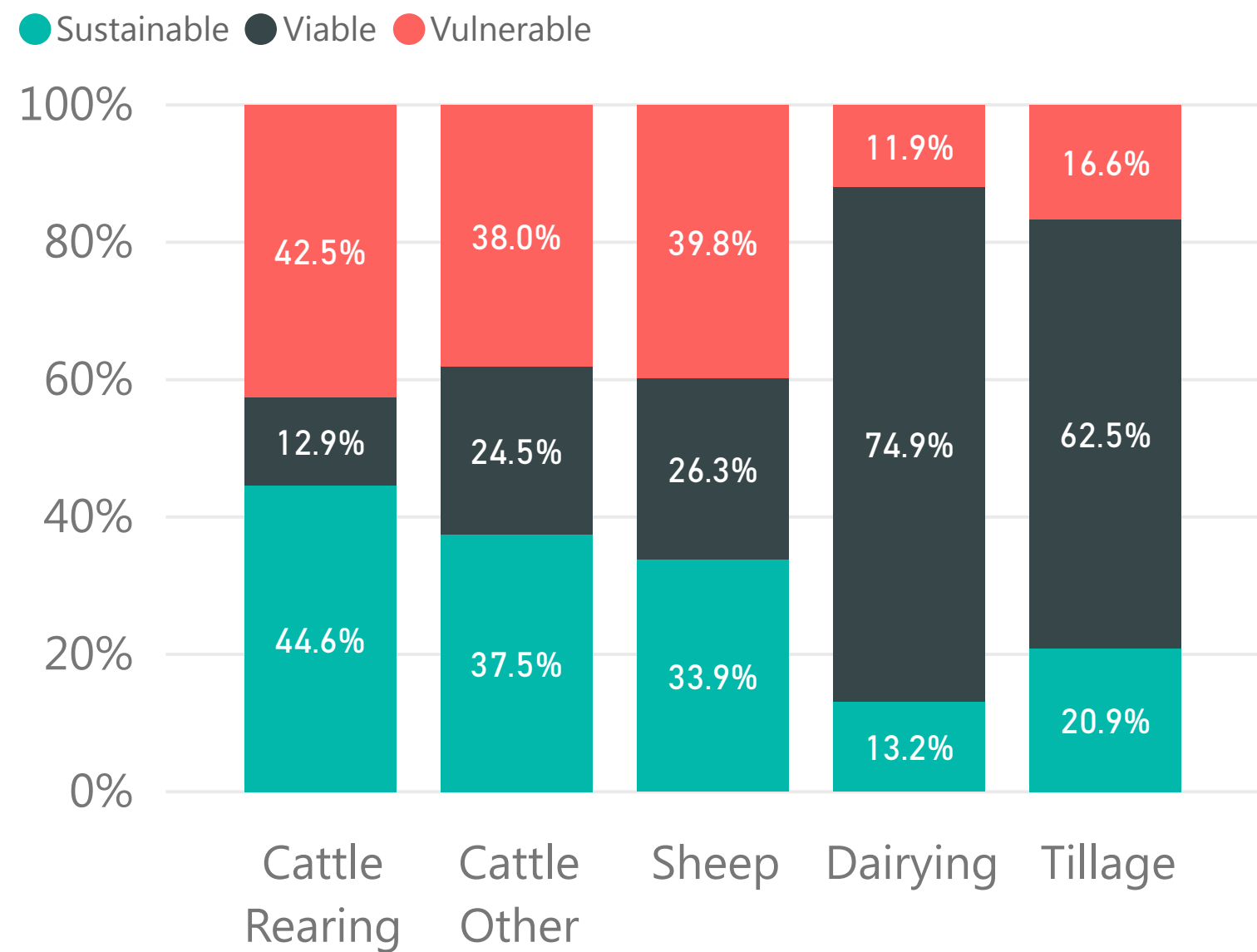
Sustainable If the farm business is not viable the household is still considered sustainable if the farmer or spouse has an off-farm income.

Vulnerable A farm household is considered to be economically vulnerable if the farm business is not viable and if neither the farmer nor spouse work off the farm.

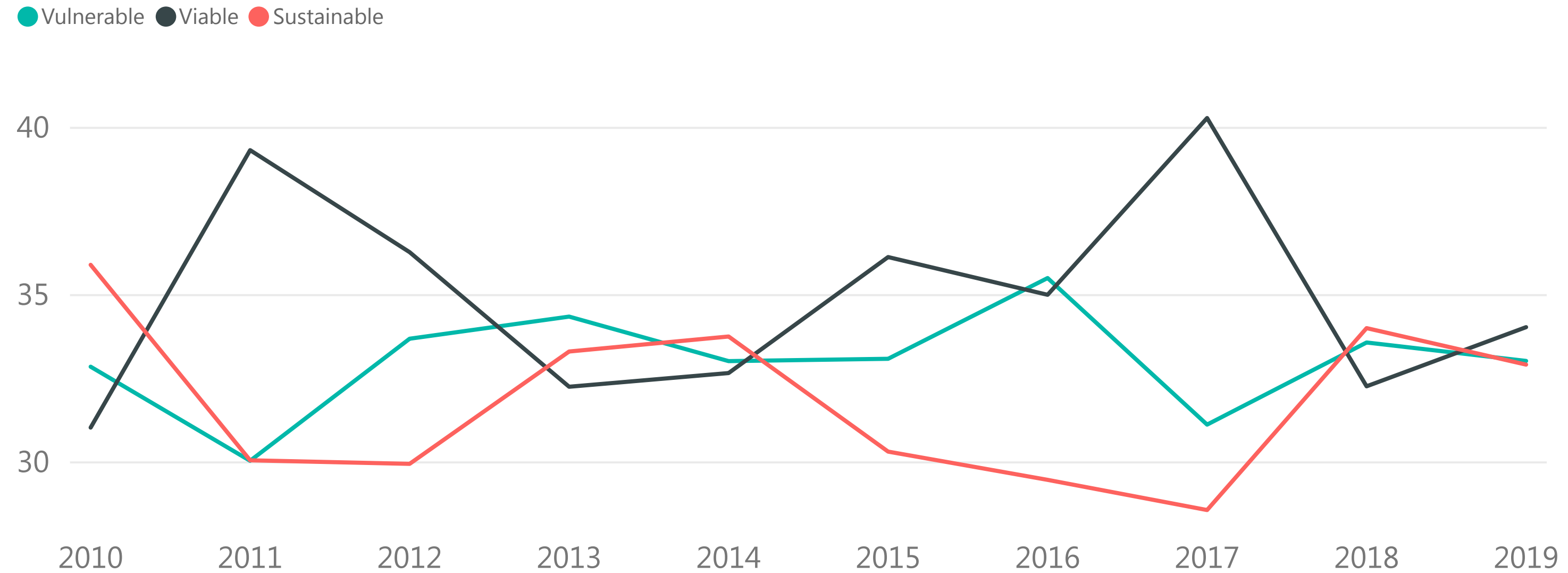
Region

National

Viability by Farm System 2019

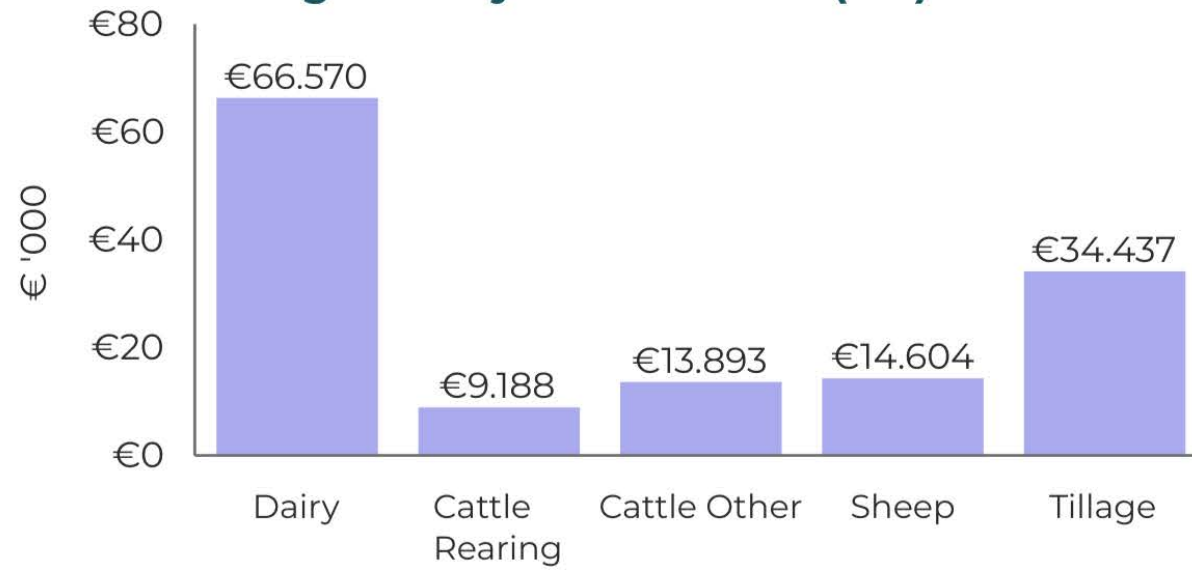


Viability over time 2010 - 2019

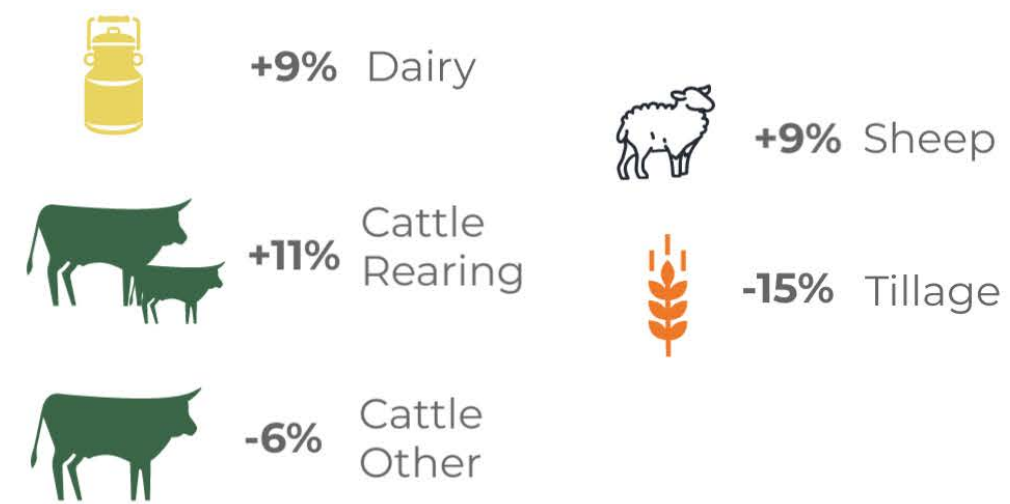


Teagasc National Farm Survey 2019

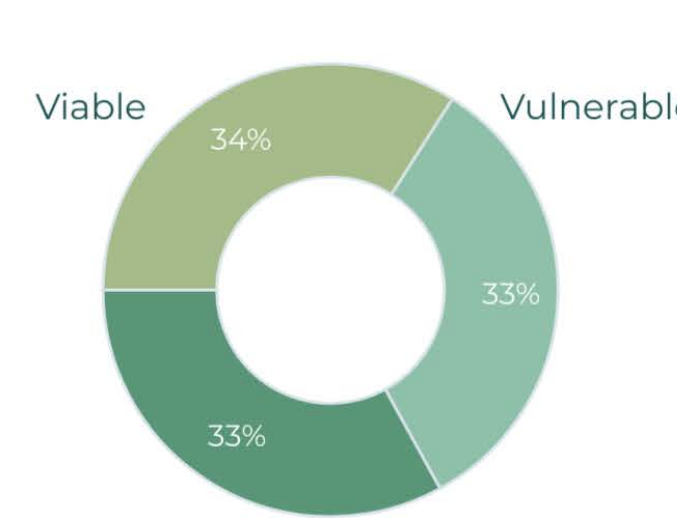
Average Family Farm Income (FFI) 2019



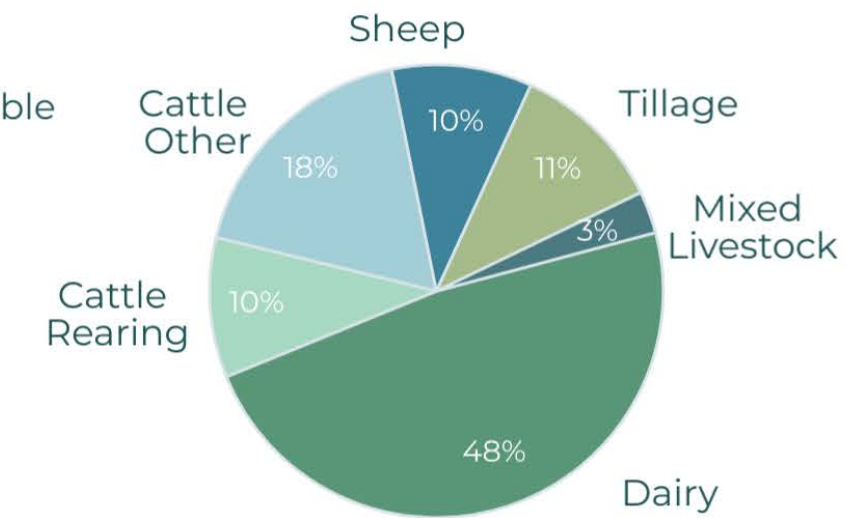
% Change in FFI 2019 vs 2018



Viability of Farm Population 2019



Aggregate FFI by System 2019



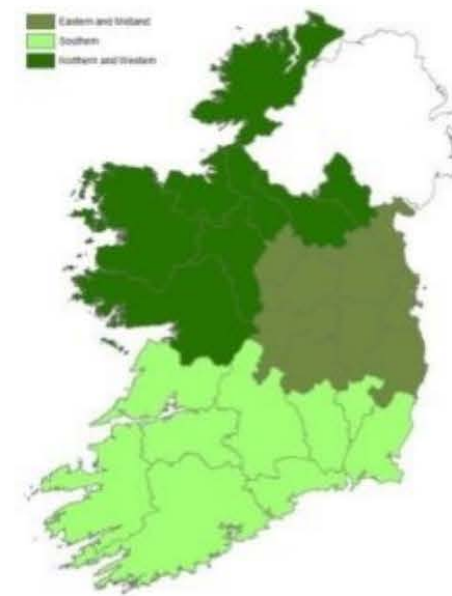
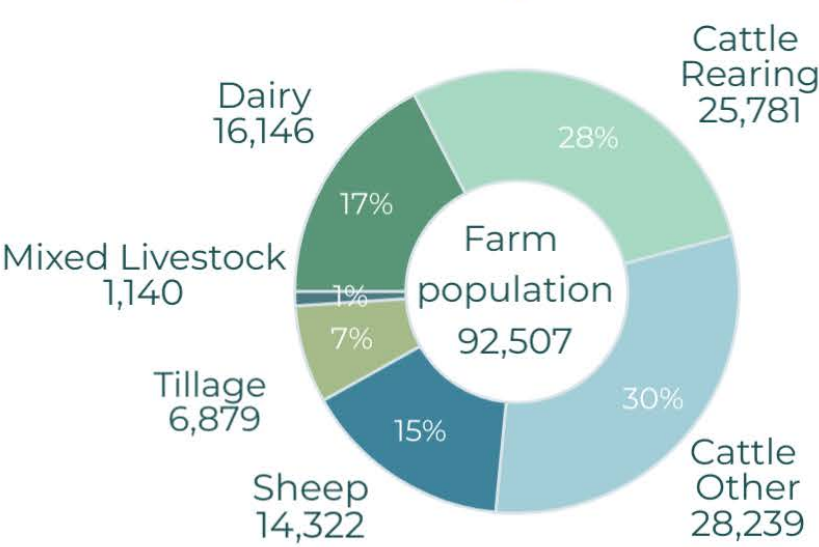
On-farm Investment up 3% to €983m



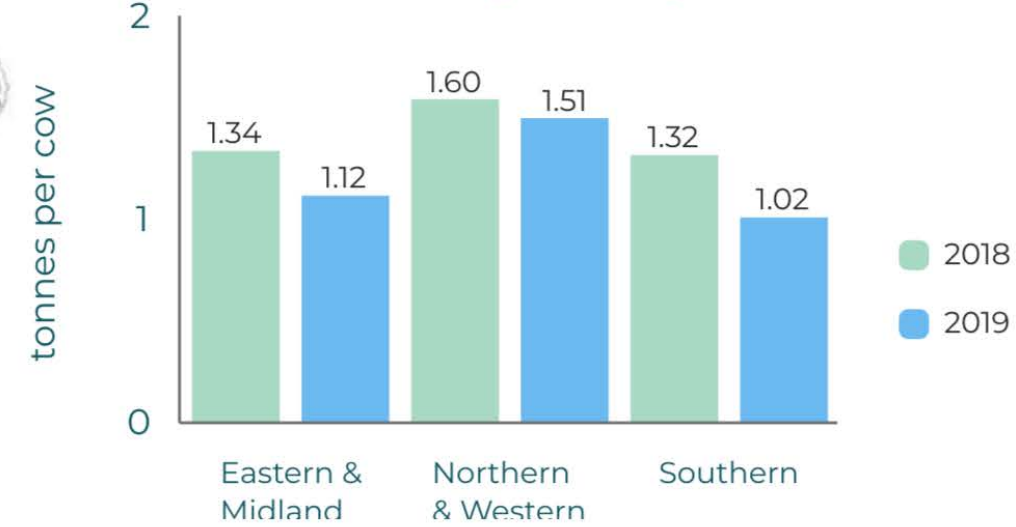
62%

of farms have no debt

NFS Farm Population 2019

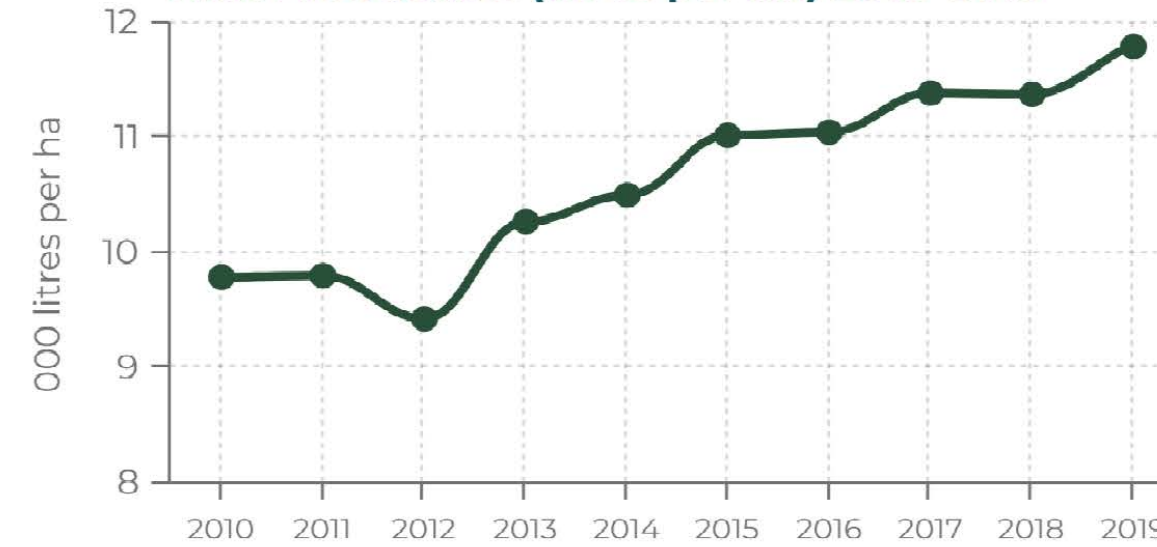


Concentrate use per Dairy Cow 2018-19



Feed expenditure down in 2019 following high usage in 2018

Milk Production (litres per ha) 2010-2019



52%

of farm households have off-farm employment