

poultry farmers. Free range eggs account for 25% of the market and this is a growth sector. This industry used 466,000 tonnes of compound feed in 2010 (13.4% of total compound feed sales) so it is a major market for Irish cereals (all island), agri chemicals, vet. products and services. Poultry slaughtered amounted to 82.1 million birds – an increase of 9.6% on 2009.

► Cereal Crops

For 2010 the area under winter wheat is estimated at 75,000 hectares (recent average has been 59,000 Ha), winter barley is up from 27,000 hectares to 35,000 hectares and winter oats is estimated to be 11,000 hectares. Yield (2.3 M tonnes is the current estimate), harvest prices and crop quality for 2011 are good although world market prices are volatile. As we know prices for Agri commodities are influenced by weather forecasts, speculation, world stocks, government policies, oil prices, currency changes etc. However more cereal growers are selling part of their crops forward and can take out crop insurance. Data released by DAFF for 2011 shows that certified seed sales for spring barley, oats and wheat increased this year. The Irish Seed Trade expects autumn cereal plantings to also increase. There are also more export prospects for malting barley and oats while growing milling wheat for Irish consumption is under consideration by Odlums. A sign of the

confidence in the arable sector is that the sale of combine harvesters is well up on the previous year according to FTMTA statistics. Irish self-sufficiency in cereals fell to 71% in 2009/2010 from 81% in 2008/2009 so there is considerable room for import substitution. According to Teagasc there are around 15,234 arable farmers & setaside claimants of whom 514 farmers have over 100 Ha planted. Another 1,173 growers have over 50 ha planted.

► Horticulture

The horticulture (excluding potatoes) sector contributed approximately €291m to farm output in 2009, the latest year for which data is available. The value of output from the mushroom sector remained reasonably static in 2010 and grower numbers have stabilised at around 80 growers. Over 70% of production is exported to the UK market and the weakening of sterling against the euro improved grower returns. During the year, growers made significant investments in energy saving measures, technology to improve quality and overall investments to improve technical efficiency. As regards potatoes while there are around 1500 farmers involved, 51% of the crop is produced in the Dublin, Louth and Meath area by only 51 growers. While the potato production area fell in 2010 this was more than offset by a very good growing season and good harvesting conditions.

The opportunity to export potatoes opened up with a significant quantity shipped to Russia in late 2010. This trade continued into early 2011 with the effect of stimulating demand for good washing quality potatoes. Forestry

In 2010 the area approved for planting was up 52% on 2009. Forestry has a critical role in climate change, construction, bio-energy, bio-diversity and potential for employment in eco-tourism, furniture and crafts etc. The area under forestry has increased to 745,456 Ha in 2010. Approx. 46.6% is privately owned and the remainder by Coillte. There are now about 15,000 farmers in the Republic with commercial forestry enterprises and long term prospects are excellent as the experts predict that demand for timber will exceed available supplies. Planting since 1990 has established about 250,000 ha of new forests. The top seven counties in 2010 for private plantings were Cork, Clare, Kerry, Galway, Kilkenny, Mayo, Tipperary- a total of 8,400 Ha were planted during 2010 in the state-the 10 year average is 10,000 Ha. Kyoto forests - those established since 1990 - will sequester 11 million tonnes of carbon dioxide over the 5-year period to the end of 2012, which will have a value to Irish Exchequer of €220 M. One Ha. of forestry will produce the energy equivalent of + 100,000 litres of oil in its lifetime and we currently import 90% of our energy needs. Only 3% of our energy

requirements are supplied from renewable resources yet our biomass yields are among the highest in the EU. Bioenergy is also more employment intensive than other forms of renewable energy.

► Aquaculture

Fish farming continues to provide valuable employment around the coast in counties Cork, Donegal, Galway, Louth, Wexford and Waterford. Some 1952 people were directly employed in the sector on a full and part time basis in 2009. In 2008 the sector accounted for approx. 20% of the total production of fish and shellfish. The volume reached 47,400 tonnes valued at €104 M in 2009- an 11% increase on 2008. In 2010 aquaculture production was estimated to be 50,000 tonnes. Exports were an estimated €379 M for 2010, up by 15% on 2009. Irish salmon (mainly organic) exports were estimated at €67M- up 33%. Shellfish exports at €143 M were up 24%. The EU is the main market with approx. 79% of sales. The balance goes to Russia, Africa and Asia.



Circulation Breakdown

The Irish Farmers Monthly has changed direction inline with the SFP and since January 2006 has moved to direct mail. We now direct mail the magazine to 22,560 top farmers in the dairying, beef, sheep, tillage and pig sector. The publication is also being mailed to all members of Veterinary Ireland, The Farm Tractor and Machinery Trade Association, all Teagasc advisors, all members of The Agricultural Science Association and key industry personnel. The move to direct mail has come at a time when farming is experiencing significant change, and we feel we can offer our advertisers a more targeted approach to their business.

► So what difference does it make?

Direct mailing Irish Farmers Monthly makes a significant difference to any brand that wants a no wastage approach to their advertising. We can guarantee a 100% reach to the dairy, beef, sheep, tillage and pig farmers.

► Facts and Figures

The Irish Farmers Monthly has built up a strong relationship with farmers since it was established in 1975. We will now for the first time be able to guarantee our advertisers a targeted circulation of 20,296 copies posted each month.

Breakdown of Circulation	
Dairy	8,690
Beef	5,300
Sheep	1,690
Tillage	1,025
Pigs	280
Veterinary Ireland	1,330
Teagasc advisers	336
Contractors	620
Poultry	310
FTMTA	300
ICMSA	305
ASA	1,300
Industry	1,074
	22,560

In addition we can offer advertisers a wrap-around 4-page cover on Irish Farmers Monthly to promote either a new product or possibly a company profile.



Irish Farmers Monthly is Ireland's leading glossy colour farmers title.

Established in 1975, Irish Farmers Monthly remains a news led publication backed by a team of acknowledged experts who provide the progressive reader with information on innovations and technical advances in the agricultural sector. Tillage, Beef, Dairy, Sheep, Animal Health and Machinery are regularly covered in our columns.

Technical Data

Page size	206mm x 290mm	Bleed size	212mm x 296mm
Type area	186mm x 270mm	Bleed size	296mm x 424mm
DPS	412mm x 290mm	Half page (upright)	87mm x 260mm
Half page	190mm x 123mm		
Quarter page	83mm x 120mm		

Advertisement Rates

DPS	Euro 6,300
Back Cover	Euro 3,900
Full Page A4	Euro 3,600
Half Page A4	Euro 1,750
Quarter Page A4	Euro 900

Prices include design and makeup of ad where necessary.

For more information please contact:
 Senior Advertising Manager
 Advertising Manager
 Editor
 Production Manager

Anna Douglas
 John Sheehan
 Margaret Donnelly
 Ciarán Brougam

anna@ifpmedia.com
 john@ifpmedia.com
 margaret@ifpmedia.com
 cbrougham@ifpmedia.com

IFP Media, 31 Deansgrange Road, Blackrock, Co Dublin
 Tel: +353 1 2893305 Fax: +353 1 2897546
www.ifpmedia.com
www.irishfarmersmonthly.com

Bright Future for Agri-Food Industry

► National Farm Income in 2010

The CSO's estimate of output, input and income in agriculture for 2010 shows that overall value of output increased by 13.1%, or €619.6 M, while expenditure increased slightly by 0.8% or €33.7m.

It was a particularly positive year for the cereals sector, with an increase of 88.8% or €95m in output value and volume increased by 7.6%. The milk sector in 2010 was up by €435.3 M or 39.6% on 2009 and the volume of milk produced increased by 7.3%. The beef sector increased in output value by 1.8%, up €27 M. The output value of the pig sector increased by 8.6% or €26.4 M the output value of the sheep sector by 6% or €9.5 M. Direct payments to farmers totalled €1,729 M.

The number of people employed in agriculture fell from 115,000 in 2008 to 98,000 during 2009, according to Teagasc. Farmers working part-time have also been hard hit by the recession. About 53% of farmers had an off-farm employment in 2009. However excellent prices in 2011 for cattle, cereals, milk, and sheep continue to boost confidence and future prospects for farming and food are excellent. Average farm size is 32.3 ha with only 7% of farmers under 35 years of age and 51% are over 55 years. According to the National Farm Survey (NFS) full-time farms had an estimated average farm income of €43,000. The agri-food sector is one of Ireland's most important indigenous manufacturing sectors, accounting for employment of 150,000 people. It includes approx. 600 food and drinks firms that export to some 140 markets worldwide.

Agri-Food Exports 2009-2010

	2009	2010 (e)	2010/2009	% Share of
	€m	€m	% Change	Agri-Food Exports
Dairy Products & Ingredients	1,960	2,285	+17%	29%
Beef	1,397	1,510	+8%	19%
Prepared Foods	1,296	1,395	+8%	18%
Beverages	1,060	1,190	+12%	15%
Pig meat	289	317	+10%	4%
Seafood	315	370	+18%	5%
Edible Horticultural & Cereals	198	200	+1%	3%
Poultry	183	200	+9%	3%
Sheep meat	164	170	+4%	2%
Live Animals	213	245	+15%	3%
	7,075	7,882	+11%	100%

Source: Bord Bia

This sector accounts for around 8% of GDP with primary agriculture accounting for 3% of GDP.

Agri-food exports have an 8.5% share of total exports. However, when the low import content and low repatriation of profits are taken into account, the sector accounts for around 25% of net foreign earnings. Food exports grew last year by 11 per cent- valued at almost €8 billion. The Govt. target is to grow this figure to €12 billion by 2020.

► Main Commodities and Exports (Food and Drink)

The UK at 44% remained the principal market with sales of over €3.4 billion- 4% up on 2009. Continental EU markets account for 34% of exports valued in excess of €2.68 billion-up 4% on 2009 levels.

- The contribution of Primary Agriculture to the Irish economy in 2010, at 3% of GDP, is twice the EU average.
- Beef and milk production account for around 60% of agri output at producer prices. Tillage and horticulture (cereals 4%, potatoes 2%, fresh vegetables & fruit 4%, forage plants 16%) account for 26% of output while pigs and sheep account for 6% and 3% respectively.
- Ireland exports some 90% of its net beef output, making it the largest beef exporter in the EU.
- Exports of Dairy Products & Ingredients accounted for 29% of agri-food exports while sheep meat exports amounted to 2%.

► Beef

Around 98% of beef exports went to continental Europe with the UK accounting for half of exports at 254,000 tonnes valued at c. €685M.

- In 2010, we exported c. 500,000 tonnes (cwe) of beef worth €1,510M.
- In 2010, 340,000 cattle were exported live and valued at €150M.

► Sheep

- In 2010, Ireland exported 36,500 tonnes of sheep meat worth €170M. France accounted for 50% of exports valued at €95M.

► Pigs

- In 2010, Ireland exported 134,000 tonnes worth approx. €317M.
- An estimated 63,000 tonnes went to the UK- valued at €195M. Continental EU markets accounted for 38,000 tonnes valued at €65M.

► Dairy

Exports of dairy products and ingredients were valued at c. €2.29 Billion

- In 2010, total domestic supplies amounted to 5,173 M litres with 388 M litres imported mainly from N. Ireland. (Source CSO data)
- The total number of milk producers at 1 April 2010 was 18,294, a drop of approx. 3.4% on 2009.

► Prepared Foods

- Prepared food exports were up 8% in 2010

with an estimated value of €1.4 billion. The UK market took 43% in the period Jan-August 2010 while Continental Europe accounted for 34% of exports.

► Beverages

- Exports experienced a 12% growth over 2009 to a value of €1.19 billion.
- Edible Horticulture & Cereals
- The value of this sector showed a modest 1% growth in exports to an estimated value of €200 million.

► Ag Colleges & Teagasc Courses

Teagasc courses attract large numbers of students into agriculture. In 2009, 1,577 new students enrolled, bringing the total participating in Teagasc-run courses to 3,222. In addition, 10,800 adult farmers completed short training courses. The biggest categories were Reps, health and safety training. The Ag colleges cannot cope with current student demand so it's good news as regards the current confidence in farming & the Agri-Food sector. This year over 2,000 students applied for 850 places in the Ag Colleges.

Northern producers now supply 25% of liquid milk. According to the National Milk Agency report for 2010 Northern milk producers now supply 25% of the liquid milk (market valued at €550M) consumed in the Republic. In the Republic average milk quota is only 283,000 litres (62,000 gals) while it is 579,000 (127,000 gals) in the North.

A major concern for ROI milk producers is their share of the retail price. Since 1995 the retail price has increased by 44% while the price

to the producer fell by 1%. The differential between manufacturing milk and higher cost liquid milk is now only about 3.2c/litre. The dominance of the multiples (79% of market) and own brands (46% of retail sales) does not bode well for Coop/Plc brands. NI milk producers also supply very significant volumes of milk – nearly 500 ml litres to five major milk processors in the border counties thereby substantially reducing overhead costs to the benefit of southern producers

► More Cows Milk Recorded

ICBF report that 50% of our cows (500,000) and 40% of our herds are now milk recorded- an annual increase of 5% pa since 2005. According to data from Teagasc (2010 National Farm Survey report) 9% of creamery milk producers with +100 cows supply 34% of the milk produced. Overall the average herd size was 42 cows and the average net margin on milk was 7c/litre and €711/Ha.

According to the Dept. of Agriculture there are 8,952 dairy farmers with a quota of over 250,000 litres. An analysis of the available data shows that the average is around 91,500 gallons and they supply over 70% of the milk produced by the cows (1.093 M in June 2010- CSO data) in the state.

We are expected to exceed our milk quota for the current year due to increased cow numbers and excellent grass growth this year. The number of heifers retained for breeding in Dec 2010 was up 2.5 % on the previous year so we can anticipate higher milk yields in years to come.

► Beef

Specialist beef production accounts for more than half of all farmers and Teagasc estimates that only one fifth of our 58,500 beef farms are economically viable. These farms are classified as 4,400 large commercial and 8,100 small viable. There are c. 80,000 farmers (CSO data) many are elderly and/or part time with 1.071M beef suckler cows (CSO Dec 2010 data) in the state. Only about 2,000 of these producers have 70+ cows. As regards beef finishers most of the bigger units are owned and rented by the corporate sector. It is estimated that there are probably less than 500 beef units finishing more than 500 cattle per annum. (Trade source).

► Live Cattle Exports

A buoyant live export trade continues to be an important outlet for cattle and provides competition in the beef trade. Live cattle exports were almost 339,000 head in 2010 – the highest since 2000- up 18% on 2009. Most of the growth was in calf exports to Northern Ireland, Italy, Netherlands and Spain.

► Ewes Make a Comeback

According to the CSO sheep numbers in the Republic which had been falling for the last 10 years have begun to recover thanks to improved prices in recent years for lambs and this year for wool. In Dec 2010 there were 2.35 Million ewes in 32,176 flocks –and the number of ewes under two years of age increased 11.7% on the previous year. 9,000 of these flocks are in hilly areas or on the mountains. There are c. 8,000 commercial lowland flocks with +100 ewes and 3,881 flocks with more

than 200 sheep. The counties with the most sheep are Donegal, Galway, Mayo, Kerry, Wicklow, Cork & Roscommon.

► Pigmeat

This industry accounts for some 7,000 jobs in production, slaughtering, processing, feed manufacture and services. Export volumes increased during 2010 by almost 10% and reached 134,000 tonnes valued at €317 M. The UK is the largest single market at €195 M and accounts for half of volume and two thirds of total value. The reopening of the Chinese and Russian markets following the dioxin outbreak saw the value and volume of pigmeat exports increase significantly in international markets.

Pig producers are very large purchasers of animal feeds (580,000 tonnes or 16.7% of total feed sales in 2010 and consistent every month of the year) and other agri inputs- a very significant market for the compound trade and agri chemical sector.

The sow herd as at Dec 2010 CSO survey was c.150,000 – a drop of 5.5% on the previous year while gilts in pig dropped by 12.7%. This decline is due to the significant losses (from poor prices and high feed costs) in recent years. The average size of commercial sow units is now around 500 sows. In 2010 the number of commercial pig farms fell to just 325.

► Poultry

The industry has a network of breeding flocks and hatcheries to support the packing of eggs and the slaughter/ processing sector. The number employed in production, processing and services is about 6,000. In the Republic there are c. 800 commercial