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Food and Agriculture: A Value Chain Analysis (2018)

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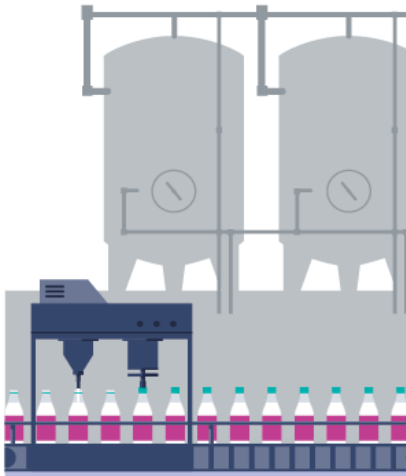
Food and Agriculture: A Value Chain Analysis (2018)



Farm Production

Output
€9 billion

Value Added
€3 billion



Food & Drink Production¹

Output
€10 billion

Intermediate
Consumption
€8 billion

Value Added
€2 billion



Exports Agriculture & Food Products¹

Value
€8 billion

Destination
Countries
159

Imports of Food & Drink for Household Consumption

Value
€3 billion

¹Domestically-owned enterprises only



Distribution: Wholesale/Retail

Margins
€3 billion

Taxes
€1 billion



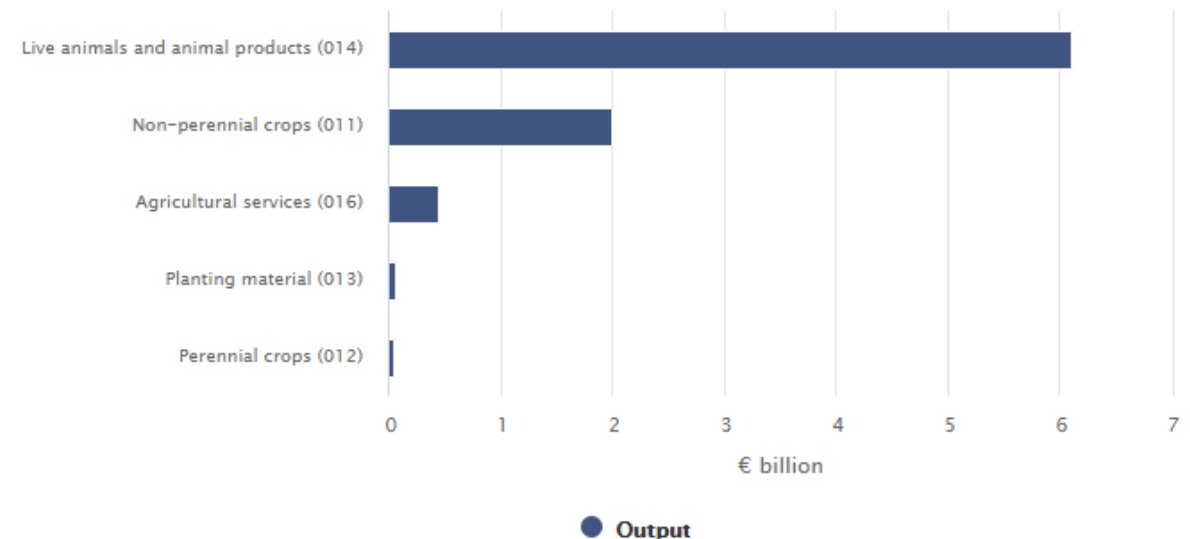
Household Food & Drink Consumption

Value
€10 billion

Agriculture

- Live animals and animal products most significant outputs (€6.1bn)
- Prepared animal feeds largest intermediate input (€1.7bn)
- 10th largest producer of agricultural products in EU (2018)
- Export to 92 countries

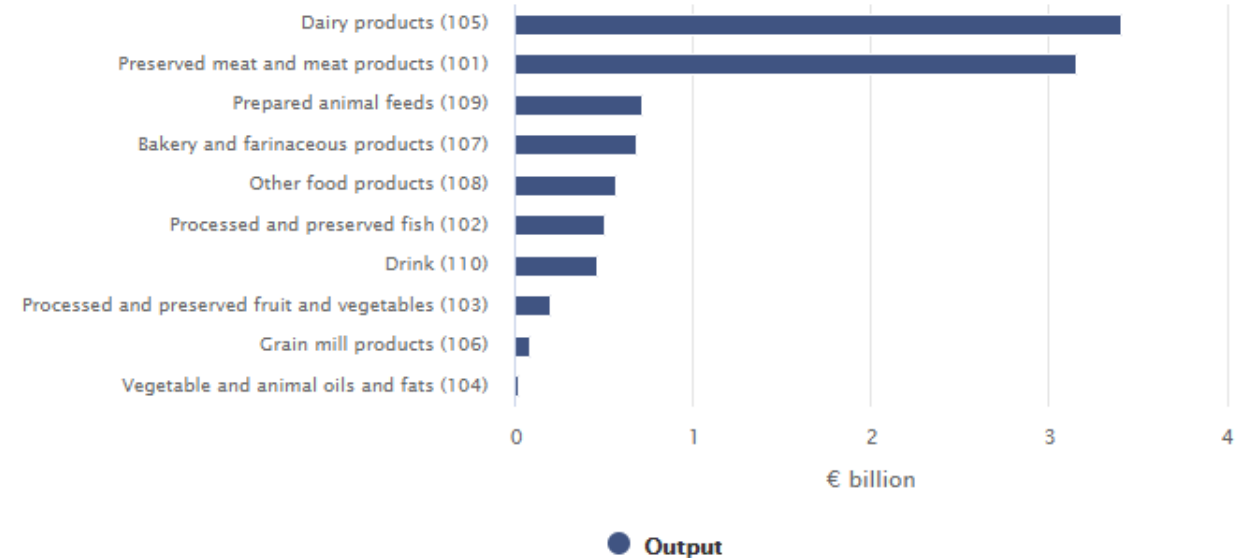
Figure 2.1 Agricultural Output by Product (CPA) 2018



Food and Drink

- Dairy products (€3.4bn) and meat (€3.2bn) most significant domestic outputs
- Live animal and animal products largest intermediate input (€4.9bn)
- 6th largest producer of food, drink and tobacco products in the EU (2017)
- Export to 159 countries

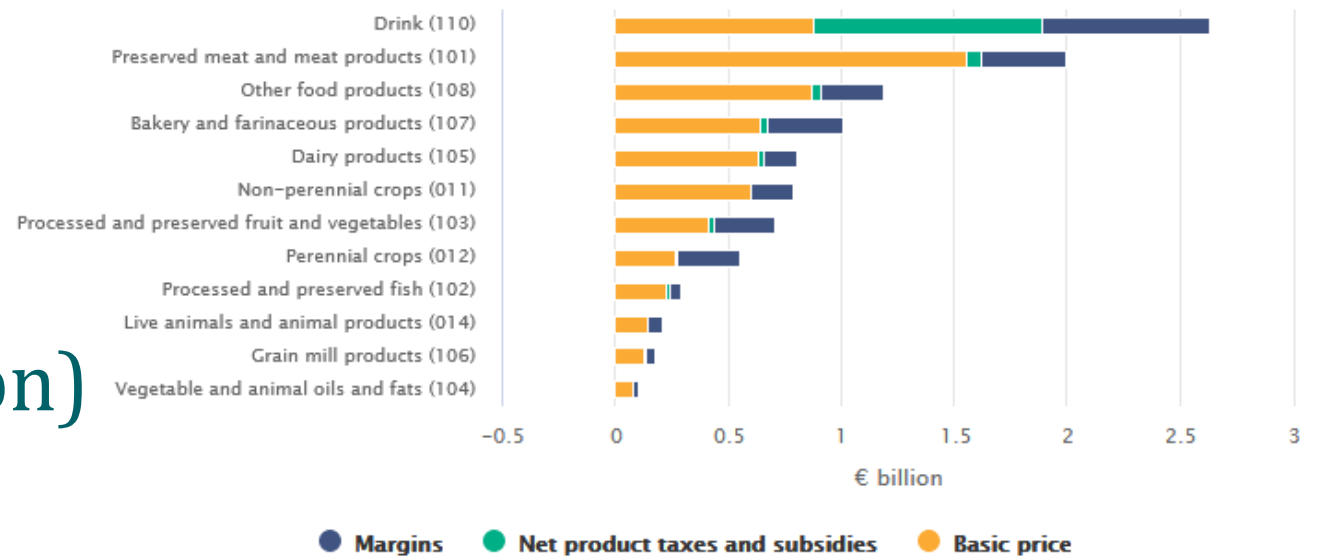
Figure 3.2 Domestic Firm Output of Food and Drink Products 2018



Household Consumption of Food and Drink

- PCE: €10.5bn
- Imports: 51% of PCE
- Largest Products: Drink (€2.6bn) and Meat (€2bn)

Figure 4.2 Household Consumption by Component 2018



Source: CSO Ireland



Globalisation

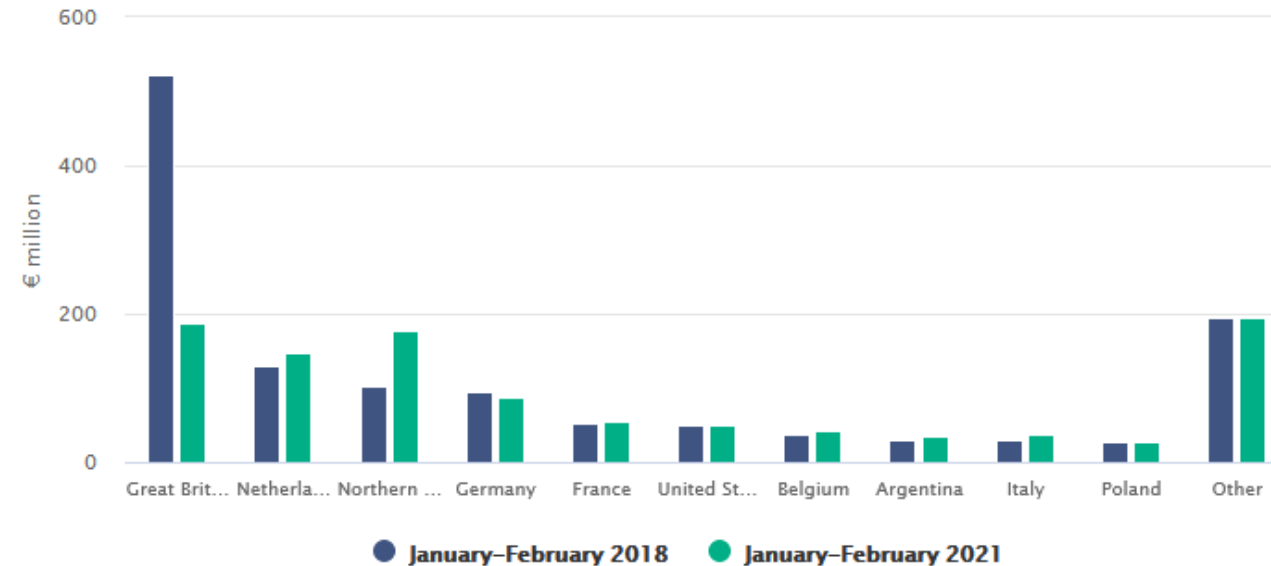
- Agriculture is dominated by Household sector
- Foreign MNEs
 - Pay 46% (€1.1bn) of Food wages, but earn 86% (€5.9bn) of profit
 - Pay €5bn investment income (dividends) to rest of world
- Domestic MNEs
 - €0.9bn net profit and €0.4bn investment income.



Effect of Brexit on Trade

- Comparison of trade with Great Britain in Jan-Feb for 2018 and 2021
- Imports 2021:
 - Agricultural Products: €20.3m (-72%)
 - Food and Drink: €188.2m (-64%)
- Exports 2021:
 - Agricultural Products: €41m (+21%)
 - Food and Drink: €418.1m (-35%)

Figure 5.2 Food and Drink Imports January-February



Administrative data sources

- Imports and exports of goods
- Revenue data – Corporation and Self Employed Tax data
- P35 data for employment /earnings?
- Agriculture Accounts data partly built from DAFM, Teagasc and Revenue





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Questions?

<https://www.cso.ie/en/releasesandpublications/fp/p-favca/foodandagricultureavaluechainanalysis/>