

**SECTION 6c -
CRITICAL ECONOMY
SECTOR:
MANUFACTURING**

6c.1 Significance of Manufacturing Sector

The 'manufacturing sector' refers to several sub-sectors of businesses that actually 'make products', some are processing primary or raw materials from the Region or are 'adding value' to other products. Most of the medium and larger businesses are involved in manufacturing and many are successfully exporting to international markets, thus trading and bringing vital 'new money' into the economy of the Region and the state.

Key manufacturing sectors in the Central Border Region include food processing, products for the construction industry including insulation / renewables products, large-scale machines for quarrying / screening / recycling, agricultural machinery, as well as some advanced manufacturing of medical devices and other components. It can also be seen that certain parts of the Region have a particular strength / dependence (possibly over-reliance) upon specific types of manufacturing e.g. food processing in Mid Ulster District & Monaghan, quarry machinery in Mid Ulster District and Fermanagh & Omagh District and medical devices in Sligo.

As can be seen from Table 21, secondary industry and employment (including manufacturing) is declining within the economy generally, but the Region remains above the respective state proportions. Nevertheless, manufacturing is still a very important strength of the Central Border Region - with several international-scale companies, many strong exporters, over 2,000 registered businesses and employing over 31,000 people.

6c.2 Number of Manufacturing Firms

Commentary

There has been a reduction in the number of manufacturing firms between 2009 and 2010 / 2011 in all the LGDs but Leitrim; with 123 less businesses in existence. Whilst the manufacturing firms in the RoI counties appear to have been more resilient than their overall number of firms, the reverse is the case in the NI districts. Of course, these figures are a snapshot of a short period - which may not have continued in recent years, and additionally, the data could hide the size of the firms and number of jobs lost.

Table 43: Number of Manufacturing Firms in Central Border Region 2009 - 2010/11*

Area	Number of Manufacturing Firms 2009	Total Firms 2009	Number of Manufacturing Firms 2010 /2011*	Total Firms 2010 /2011*	Reduction in Manufacturing Firms 2009-2010/11		Reduction in Total Firms 2009-2010/11
Cavan	226	3,261	215	3,056	-11	-4.9%	-6.3%
Donegal	437	6,176	418	5,649	-19	-4.4%	-8.5%
Leitrim	90	1,408	92	1,330	2	2.2%	-5.5%
Monaghan	290	2,792	278	2,641	-12	-4.1%	-5.4%
Sligo	177	2,607	174	2,458	-3	-1.7%	-5.7%
Armagh City, Banbridge and Craigavon Borough	595	8,390	545	8,100	-50	-8.4%	-3.5%
Fermanagh & Omagh District Council	385	7,560	365	7,345	-20	-5.2%	-2.8%
Mid Ulster District Council	705	8,315	695	8,140	-10	-1.4%	-2.1%
ICBAN Region	2,905	40,509	2,782	38,719	-123	-4.23%	-4.42%
Rep of Ireland*	13,363	206,575	12,790	195,431	-573	-4.3%	-5.4%
Northern Ireland	4,555	70,620	4,280	67,955	-275	-6.0%	-3.8%

*RoI Latest figures are 2010, NI figures are 2011.

Source: CSO & DETI /

NISRA

<http://www.cso.ie/px/pxeirestat/Statire/SelectVarVal/Define.asp?maintable=BRA18&PLanguage=0>

2009/10 RoI

http://www.detini.gov.uk/facts_and_figures_edition_12_dec_2009-3.pdf p2 Link, Table 1.5, NI 2009

http://www.detini.gov.uk/idbr_publication.pdf Page 2 Link, Table 1.5 or

<http://www.ninis2.nisra.gov.uk/public/Theme.aspx> NISRA NINIS2, Statistics, Business & Energy, VAT / PAYE Businesses, by LGD 2008-2011

6c.3 Number Employed in Manufacturing

Commentary

The 2011 Census show that there were 42,796 people employed in manufacturing in 2011, a reduction of 5,520 or 11.4% in the previous 10 years. However, the numbers have actually increased in Mid Ulster. Nevertheless, the manufacturing sector remains strong across the Region, being notably above the state employment percentages in Cavan, Monaghan, Sligo, Mid Ulster and Armagh City, Banbridge and Craigavon Borough.

Table 44: Employment in Manufacturing in Central Border Region - Census 2001/02 - 2011

Area	2001 / 02		2006		2011	
	Number*	% of LF/EA that is At Work	Number	% of LF/EA that is At Work	Number	% of LF/EA that is At Work
Cavan	4,008	17.9%	4,406	15.6%	3,928	14.4%
Donegal	7,752	16.0%	6,245	11.0%	4,537	8.5%
Leitrim	1,360	13.6%	1,392	11.0%	1,032	8.6%
Monaghan	3,911	18.5%	4,129	16.3%	3,316	14.4%
Sligo	3,735	15.6%	3,631	13.3%	3,047	12.0%
Armagh City, Banbridge and Craigavon Borough Council	13,856	18.7%	N/A	N/A	11,942	13.3%
Fermanagh & Omagh District Council	5,240	12.7%	N/A	N/A	4,905	10.0%
Mid Ulster District Council	8,454	17.9%	N/A	N/A	10,089	16.4%
ICBAN Region	48,316	16.7%	N/A	N/A	42,796	12.5%
Rep of Ireland	244,203	14.9%	243,182	12.6%	193,080	10.7%
Northern Ireland	97,365	14.2%	N/A	N/A	77,072	9.7%

Source: *Rol Census - CSO & NI Census - NISRA*

<http://www.cso.ie/px/pxeirestat/Statire/SelectVarVal/Define.asp?maintable=CD319&Language=0> Rol 2011 Census (& 2006) Broad Ind. Group - Manufacturing Industries

<http://census.cso.ie/Census/TableViewer/tableView.aspx?ReportId=1485> Rol 2002 Census, Interactive Tables, Volume 5, Table 13

http://www.nisra.gov.uk/Census/key_stats_bulletin_2011.pdf 2011 NI Click on p 31 link to Table KS605NI (Persons) (or KS607NI (Males), KS608NI (Females))

<http://www.nisra.gov.uk/Census/2001%20Census%20Results/Key%20Statistics/KeyStatisticstoOutputAreaLevel.html> 2001 NI Scroll down to Table KS11a.

Overall LF/EA figure for ICAN was not available

6.c.4 The Manufacturing Firms of the Central Border Region - Key Sectors

Some of the main manufacturing firms across the Region are detailed in the 'Main Firms' table at the start of Section 6. Within the manufacturing sector of the Region, three notable / innovative sectors can be identified, though there is a lack of publicly available data on these specific industrial groups; key companies and data sources include:

Manufacture of Insulation and other environmental products

Kingspan, Quinn-therm, Ballytherm (Ballyconnell), Airpacks (Kilnaleck), Cavan. Several Cookstown firms are making water-treatment plants. Balcas, RDT Crawford (Fermanagh), Merenda (Leitrim) and some other wood-processing businesses make wood pellets / fuel products.

<http://www.intertradeireland.com/researchandpublications/publications/name,925,en.html> All-island Renewables Industry report, March 2012

<http://www.intertradeireland.com/researchandpublications/publications/name,887,en.html> All-island Environmental Goods & Services report, Oct 2008

Manufacture / engineering of Quarry / recycling / materials-handling machinery

Terex-Finlays, Sandvik, Powerscreen, Bruce Engineering, Annaconda Equipment, Terramac Fabrication, Mixtec, Kiverco, McCloskey International, Mallaghan Engineering, Metso Minerals, McCrory, Portafill, Ruddy, Telestack, etc.,

Food Processing

Loughry Food Business Incubation Centre, Lough Egish or the Food Hub Drumshanbo. Substantial meat plants in Mid Ulster District, Armagh, Banbridge and Craigavon Borough, Fermanagh and Omagh District, Monaghan, Cavan, etc. and Killybegs for fish. Many large, exporting companies such as Moy Park, Glanbia, Lakeland Dairies, Dromona, Kerry Foods, Fivemiletown Creamery, Linden Foods, Karro Food Group (Vion Foods), Dunbia/Dungannon meats, Foyle (Hilton and Omagh) Meats, AIBP, Liffey Meats, Mc Carren Meats, Linwoods, Tayto, Strathroy, Flynn Fine Foods, Keyttle Fine Foods, Silverhill Foods, Donegal Catch / Green Isle, Genesis Crafty etc. Additionally, there are many smaller 'artisan' food producers throughout the Region.