

# Exporting Northern Ireland Services Study 2013

Theme: Economy Statistics

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## Headline Results



### Context

The Exporting Northern Ireland Services (ENIS) study was first introduced by the Department of Enterprise, Trade & Investment in 2003 to further understand and estimate the value to the Northern Ireland economy of exporting services. The publication brings together service sector export information for the construction and manufacturing sectors and for a “High Export Potential” (HEP) group. The latter group includes a range of service industries employing 10 or more persons which have been deemed on the basis of earlier research to have a high potential to trade in services.

It should be noted that while the ENIS report provides coverage of a specific subset, it **does not** provide a complete picture of the total level of service exports in Northern Ireland. The new experimental [Broad Economy Exports \(BEE\)](#) findings for 2011 and 2012 were published in March 2015 and indicate a much higher level of exporting activity across the Northern Ireland economy than previously indicated. NISRA envision that the new BEE measure will replace ENIS as the primary source of information on the value to the NI economy of exporting services. The current publication provides updated provisional results (to 2013) using the ENIS methodology, pending release of BEE results for 2013 and 2014 later in the year. Full data tables from 2003 – 2013 are available for download via the [Exporting NI Services publication page](#). For additional publication details and methodology please refer to the ENIS [background information](#) document.

### Total known value of service exports

- The total value of service exports in the Manufacturing, Construction and High Export Potential sectors covered by the survey was estimated to be £653.1 million in 2013, an increase of 7.8% compared to the 2012 estimate of £605.9 million.
- This improvement was mainly driven by an increase in exports from the High Export Potential (HEP) group, which increased by £52.0 million (17.7%), from £293.1 million in 2012 to £345.1 million in 2013.

### Manufacturing service exports

- Improvement in the total known value of service exports was also driven by an increase in exports from the manufacturing sector. The export of services in the manufacturing sector rose by 19.9% (£21.6 million), from an estimate of £108.5 million in 2012 to £130.0 million in 2013.

### Construction services

- Service exports in the construction sector were estimated to be worth £178.0 million in 2013, representing a decrease of 12.9% over the year. The export of services in the construction industry fell by £26.3 million from an estimate of £204.3 million in 2012.

- The number of construction companies employing 10 or more employees varies from year to year; 1,000 in 2009, 709 in 2010, 691 in 2011, 586 in 2012 and 561 in 2013. This can fluctuate due to a number of factors, namely closure of a company, change of industrial activity (SIC) or a company's employees shifting above or below the 10 employee threshold.

### **Export of services by the High Export Potential group**

- In 2013, the High Export Potential Group exported services valued at £345.1 million; this represents an annual increase of £52.0 million or 17.7%
- The largest absolute increase in exports was in the Computer & Related Activities sector (£50.8 million or 23.1%), from £220.3 million in 2012 to £271.1 million in 2013.
- The Computer & Related Activities industry also contributed the largest share of exports, accounting for 78.6% of the total services exported by the high potential group in 2013.
- The largest annual percentage increase was in the Research & Development sector (27.4%, or £8.2 million), from £30.0 million in 2012 to £38.2 million in 2013.
- The largest annual percentage decrease was in the Business & Management Consultancy Activities sector (- 38.7%). This sector also reported the largest absolute decrease in exports, falling by £3.7 million from £9.6 million in 2012 to £5.9 million in 2013.
- The growth rate from 2009 to 2013 of 53.0% (£119.6 million) shows that there has been a noticeable rise in the trade of services in the high export potential group over the five year period, from £225.5 million in 2009 to £345.1 million in 2013.

### **Exports as a Proportion of Sales**

- In 2013, exports within the high export potential category accounted for approximately 25.1% of total sales within the High Export Potential group. This was an increase of 3.5% over the year, from 21.6% in 2012.
- Some sectors were noticeably more export-active than others. For example the Research & Development sector generated almost half of sales from exports (42.3%), and Computer & Related activities generated over one third (38.1%).
- The Research & Development sector saw the largest percentage increase in exports as a percentage of total sales, from 35.2% in 2012 to 42.3% in 2013, an increase of 7.2%.
- Exports within the Creative Entertainment sector reported the largest percentage decrease in exports as a proportion of total sales by sector, decreasing from 6.9% in 2012 to 5.0% in 2013, a decrease of 1.9%.

### **Destination of Exports**

- Over the year the value of exports to the Republic of Ireland (ROI) and the Rest of the World (ROW) have increased (42.9% and 12.8% respectively) while exports to the Rest of Europe (REU) report a percentage decrease (-5.1%).
- The Rest of World (ROW), which is composed of all export countries outside the European Union, accounted for the majority of exports in the high export potential group with almost three quarters (72.0% in 2012 and 69.0% in 2013) of export sales destined for such countries.

## Invest NI Client Exports within the High Export Potential Group

- Invest NI client companies account for 88.6% (or £305.8 million) of total exports made by companies within the high export potential group in 2013.
- The value of export services amongst Invest NI clients increased by 18.9% (or £48.6 million) over the year, from £257.2 million in 2012 to £305.8 million in 2013.

### For further information

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