

PERFORMANCE REPORT

2020/21 - 2024/25





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INTRODUCTION

OUR ROLE

As Northern Ireland’s regional business development agency, our role is to grow the local economy by supporting new and existing businesses to accelerate innovation, compete internationally, and by attracting new investment to Northern Ireland.

Our new Business Strategy¹ sets out our priorities, objectives and metrics for the period 2024/25 to 2026/27. As a non-departmental public body and part of the Department for the Economy, our strategy is aligned with, and designed to deliver against, the Economy Minister’s Economic Vision², specifically its four key objectives, of Productivity, Good Jobs, Regional Balance and Decarbonisation, and the Programme for Government’s³ Grow a Globally Competitive and Sustainable Economy priority.

We offer the NI business community a single organisation providing high-quality services, programmes, support and expert advice. As our resources are limited, we use them principally to support those businesses that can make the biggest contribution to growing our economy in line with **our strategic priorities**:

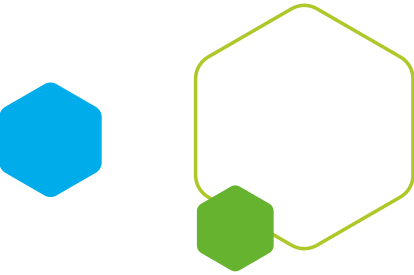
-  **BOOSTING BUSINESS INVESTMENT**
-  **ACCELERATING INNOVATION AND SKILLS**
-  **DRIVING GLOBAL AMBITION**
-  **DEVELOPING AND ACHIEVING SUSTAINABILITY**
-  **MAXIMISING CITY AND GROWTH DEALS IMPACT**
-  **PROMOTING PLACES AND PARTNERSHIPS**

We will actively seek out businesses, both existing clients and businesses new to Invest NI, to support them in accelerating their growth by boosting investment against recognised drivers of productivity.

Regardless of your stage of development, or level of ambition, we have support to accelerate your journey. This may be financial or non-financial in nature. Around a third of our investments involve simple practical advice, guidance and / or technical knowledge and consultancy through our expert staff, Business Support Team⁴, Business Information Centre⁵ or through nibusinessinfo.co.uk⁶, our online business advice portal.



1. 'Our Future in Focus' - Invest NI Business Strategy 2024-27
2. Economy Minister's Economic Vision
3. Programme for Government - 'Doing what matters most'
4. Contact Invest NI through our Business Support Team.
5. Business Information Centre brochure
6. nibusinessinfo.co.uk



THIS REPORT

The Invest NI Performance Report has been produced to enable access to a wide range of data and information relating to our performance and the performance of businesses we support. It is important to note that this report only analyses the performance of businesses supported by Invest NI. The information is presented by:

- business ownership
- industry sector
- council area
- business size
- type of support.

The first part of the report presents information on the performance of businesses supported in 2024, which is measured using a set of client performance indicators (CPIs). The second part of the report contains a summary of the support we have offered to businesses between 2020/21 and 2024/25 to help develop the NI economy. It should be noted that the latest year’s data are provisional and subject to change.

Our Business Strategy 2024-2027, published earlier this year, places a renewed focus on accelerating our journey towards Net Zero by helping our businesses to embed sustainable approaches, improve energy efficiency and reduce waste. This year’s report therefore contains new analysis on the support we have offered to businesses to help develop and achieve sustainability.

Our Strategy also commits to a revamped regional approach, as envisaged in the Minister’s sub-regional economic plan, increasing our resources and capability in this area. This will improve support available to all our businesses across NI, whilst also retaining provision to continue to support the growth of Belfast as our regional engine. In line with this approach, this report highlights our performance inside and outside the Belfast Metropolitan Area (BMA).

OUR CPIs

The CPIs are an annual survey of our CPI portfolio, which includes the majority of financially supported businesses. A small number of businesses that we support are not included in the CPI survey sample, mainly those trading in NI for less than 18 months. The survey collects financial and employment information through indicators such as employment, sales, external sales and exports to enable measurement of the performance and growth of the portfolio.

OUR INVESTMENT ACTIVITY

The information in this section relates to business investments we have offered support to between 1 April 2020 and 31 March 2025. It presents an analysis of the number and value of investments supported, the amount of investment in the local economy that this support contributes towards, and the number of jobs expected to be created as a result.

HOW OUR OFFERS WORK

When a business applies for support towards a project (such as investing in R&D, creating jobs or building a new factory), we will assess a detailed business plan to ensure the project meets State Aid guidelines and funding criteria. If it does, we will offer support (assistance) towards the project based on a percentage of the total project cost (investment), and the type of project.



A formal Letter of Offer is issued which contracts the company to deliver the project and provide us with specific detail and evidence of progress based on agreed milestones to be met over the lifetime of the project. It is therefore important to note that there is a lag between support being agreed at the start of a project, and the delivery of these milestones by the company as the project progresses. However, we will only release our funding when we receive evidence that milestones have been met. For example, we will only release support towards jobs once the jobs are in place and the company has provided PAYE evidence. We will also monitor a project for a period of time after completion to ensure the commitments are maintained.

If a project does not proceed as planned - either more slowly, or not to the same scale - we will revise our offer of support and release our funding accordingly. We do not increase our offer if project costs are higher than expected.

DEVELOPING AND ACHIEVING SUSTAINABILITY

A key strategic priority in our Business Strategy is to improve our resources, capability and capacity to help NI businesses deliver Net Zero and seize related opportunities in the Low Carbon and Green Economy. Our team will deliver comprehensive support to help businesses decarbonise, slash energy costs and boost their resilience. We have collected data over the past two years to measure our progress against this priority. This year’s report contains a new section that summarises these data under the two main supporting metrics associated with this priority - support for businesses to decarbonise through greater use of Energy and Resource Efficiency Technologies and support to help businesses diversify into the Low Carbon and Green Economy.

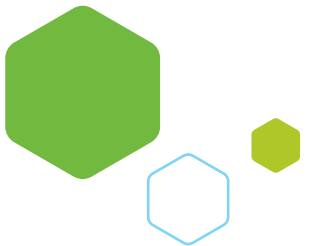
CONTEXT

When considering this report, the considerable challenges faced by both NI businesses and Invest NI over the past 5 years should be recognised, including the COVID-19 pandemic, EU Exit, increased energy prices, a challenging public funding environment and a sustained period of international conflict.

COVID, together with other factors such as the cost-of-living crisis, had a significant and lasting impact on the ability of businesses to bring forward economic development projects for us to support. However, our pipeline of projects has started to recover and the level of investment we have secured has been increasing for the past three years. Similarly, supported businesses experienced a fall in sales, external sales and in particular exports, but recovered to exceed pre-pandemic levels in 2022 and continued to show growth in 2024.

It should also be recognised that our revamped regional approach will take time to embed and the measures that we implement are not reflected in the information contained within this report. When analysing regional performance, it is also important to note that where a new business chooses to locate is driven by many factors including availability of a skilled workforce, infrastructure, size of land required and the location of similar businesses. In the case of established businesses, reinvestment patterns will usually be determined by the existing location of the business. The relatively small size of Northern Ireland means that a project assisted in a particular location has the potential to create benefits across a much wider area. Indeed, census data indicates that many people in Northern Ireland travel across constituency and council area boundaries to go to work.

Definitions of the terms used in this report can be found in the glossary on page 46.



INVEST NI

CLIENT PERFORMANCE INDICATORS

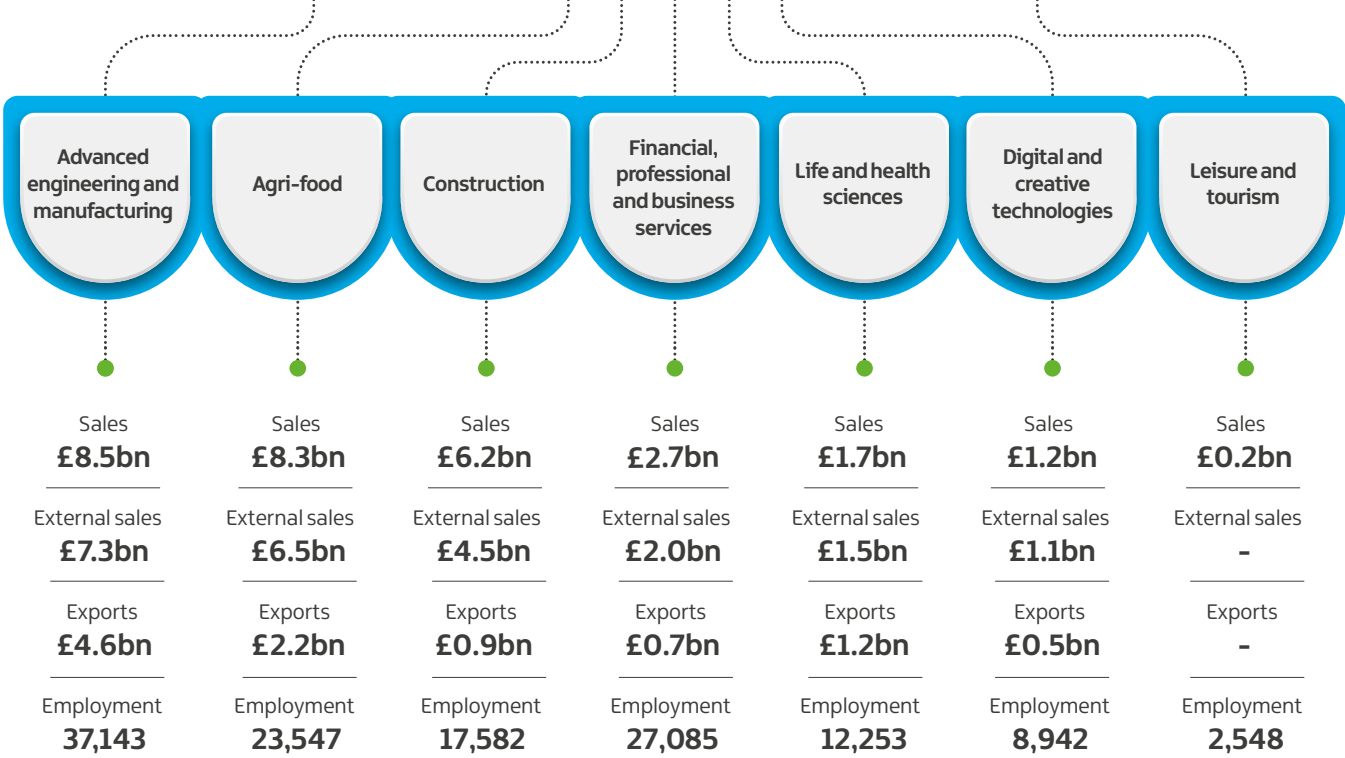
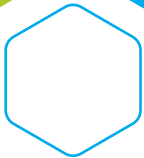
OVERVIEW 2024

£22.9bn
total external sales

129,101
total employment

£28.9bn
total sales

£10.2bn
total exports



LOCALLY-OWNED



Employment
67,667

Sales
£16.2bn

External sales
£11.7bn

Exports
£4.4bn

EXTERNALLY-OWNED



Employment
61,434

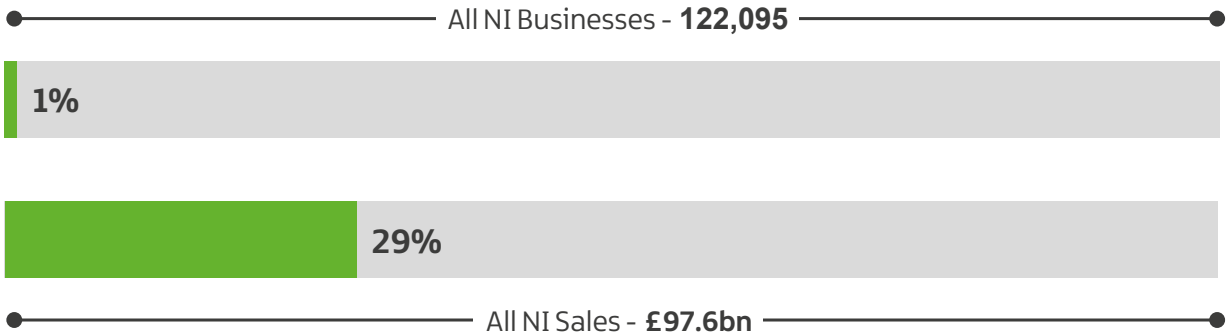
Sales
£12.7bn

External sales
£11.2bn

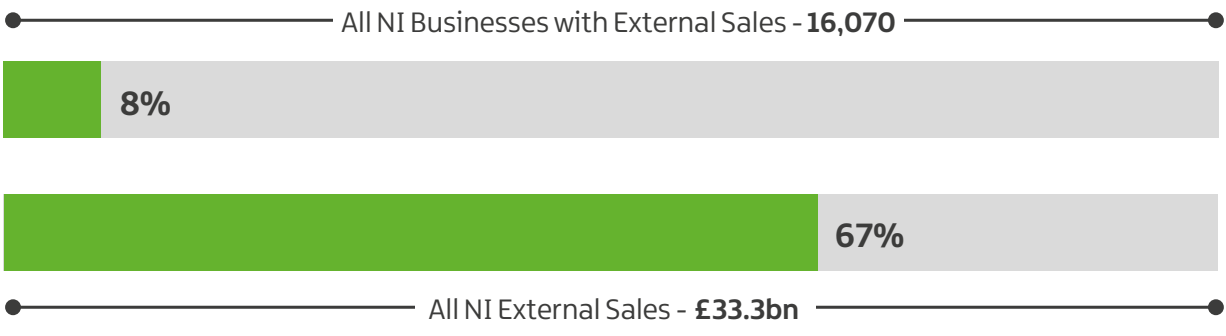
Exports
£5.8bn

86%
of companies are
locally-owned

PORTFOLIO CONTRIBUTION



Our supported businesses account for **1% (1,428)** of all businesses, but generate **29% (£28.2bn)** of all sales.



Our supported businesses account for **8% (1,330)** of all businesses with external sales but generate **67% (£22.2bn)** of all external sales.



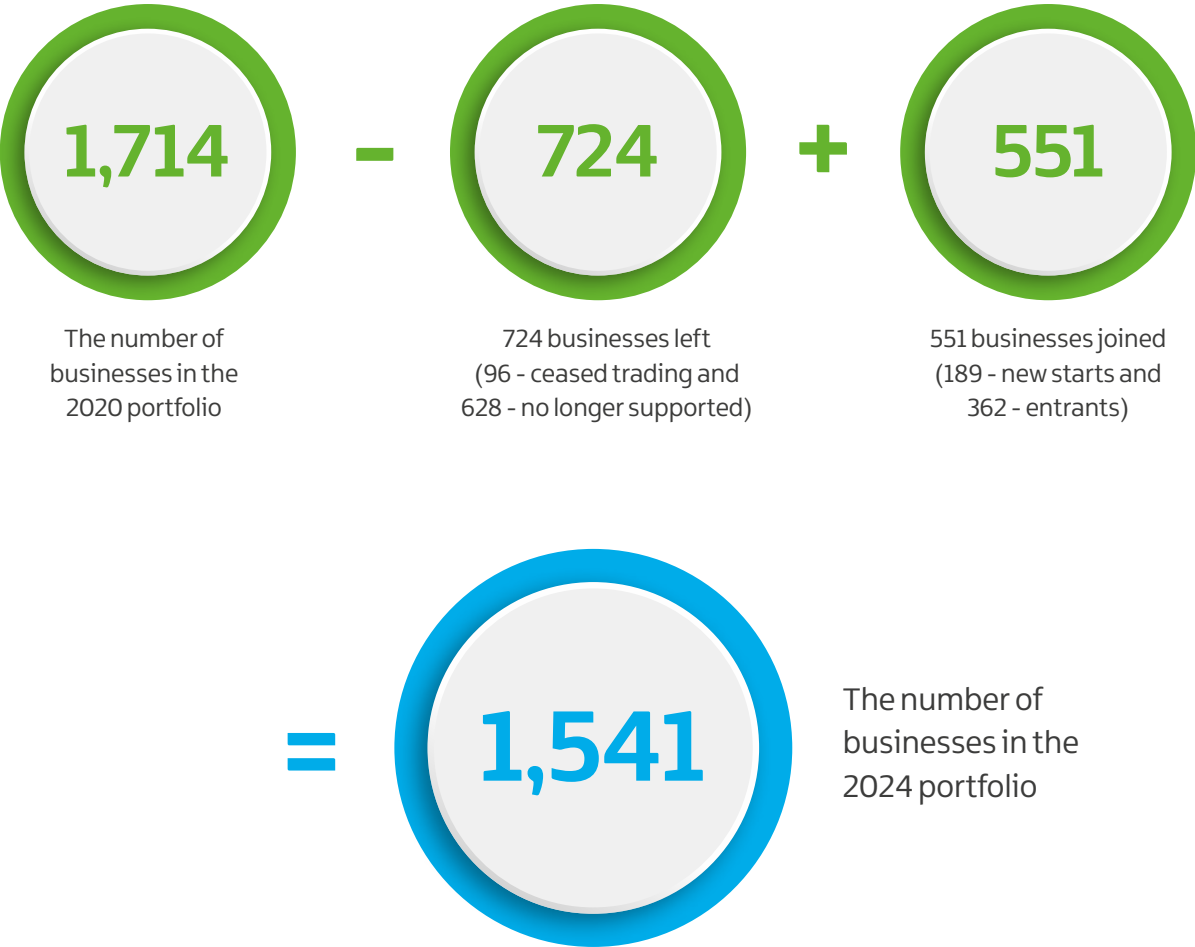
Our supported businesses account for **10% (1,217)** of all businesses with export sales but generate **62% (£10bn)** of all export sales.

The information in this section positions the CPI portfolio in the context of the overall Northern Ireland business base, showing its important contribution to private sector sales, external sales and exports.

The 2023 portfolio has been used as corresponding NI level data is not yet available for 2024.

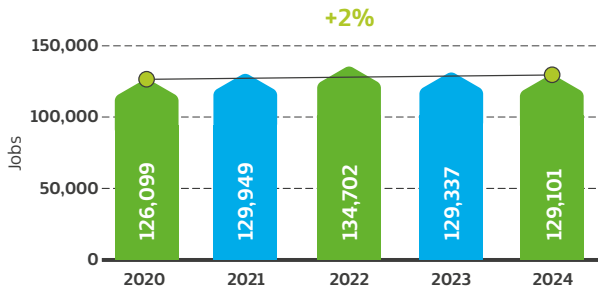
TOTAL OUTCOMES

PORTFOLIO CHANGE - BUSINESSES 2020-2024

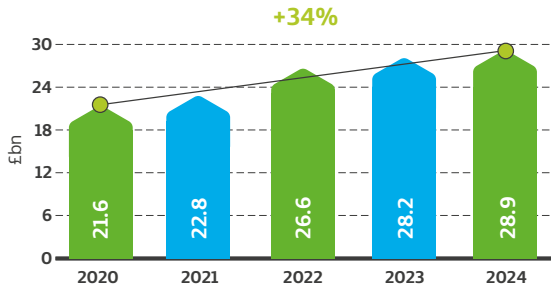


The CPI sample has declined by approximately 10% over the 5 year period, which reflects a reduced number of businesses seeking support during this time due to the economic shocks outlined earlier in this report.

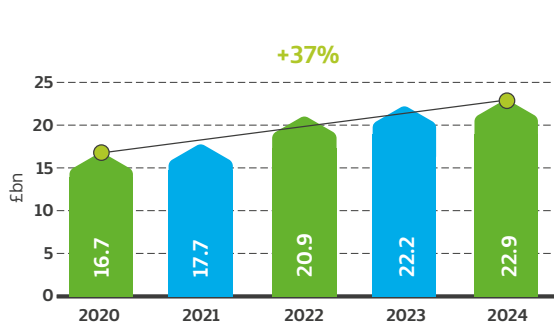
EMPLOYMENT 2020-2024



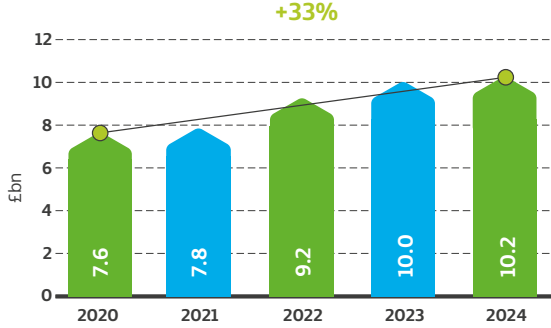
SALES 2020-2024



EXTERNAL SALES 2020-2024



EXPORTS 2020-2024

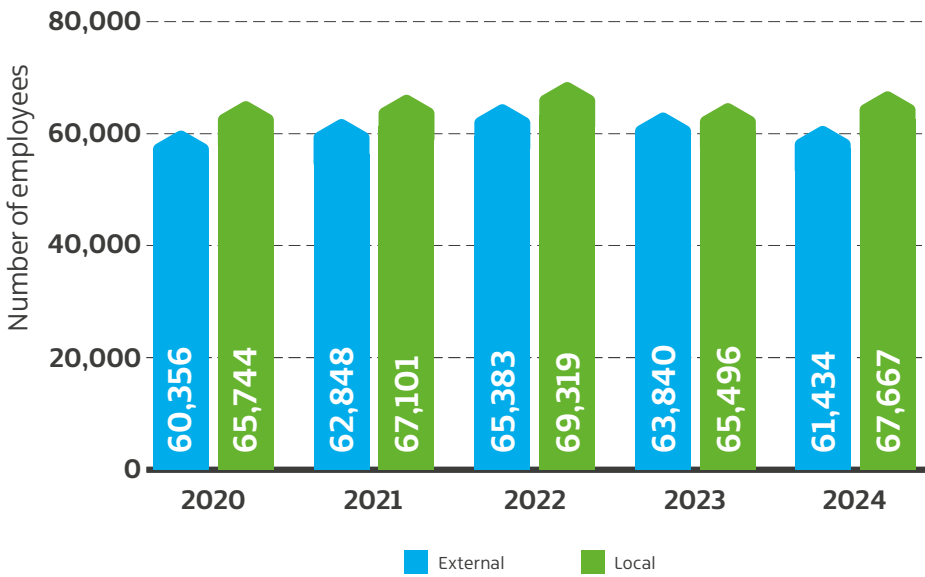


Consistent with the broader NISRA and ONS statistics covering the whole NI economy, our CPIs recorded a drop in employment, sales, external sales and exports due to the impact of Covid in 2020. This should be considered when interpreting growth rates in which 2020 is the base year as the growth rate is unlikely to reflect an average year.

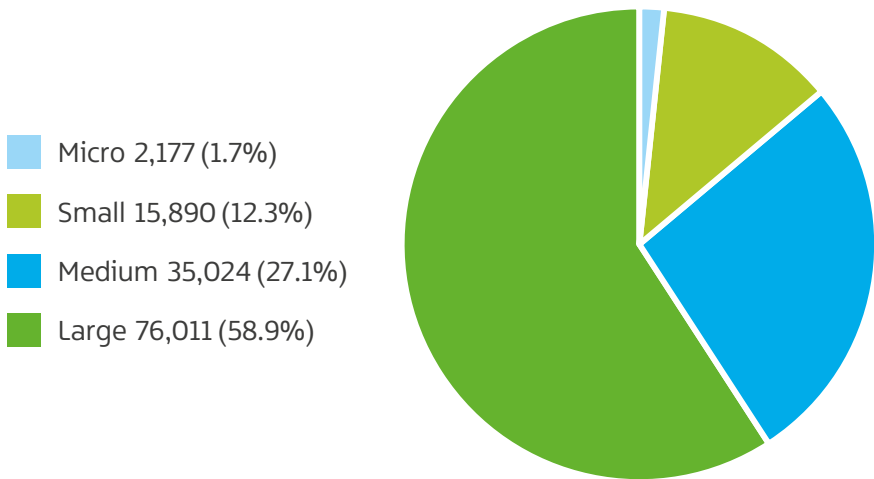
- Employment growth among the core group of Invest NI supported businesses was flat between 2023 and 2024.
- Turnover has increased by **2.5%**, with external sales and exports increasing by **2.9%** and **1.6%** respectively over the year.
- Between 2020 and 2024 life and health sciences was the fastest growing sector for employment, increasing by **36.8%** over the period.
- The agri-food sector recorded the largest sales growth over the period 2020 to 2024, increasing by **39.7%**.
- Digital and creative recorded the largest exports growth over the period 2020 to 2024, increasing by **62.2%**.
- Causeway Coast and Glens has recorded the largest sales growth over the period 2020-2024, increasing by **56%**.

EMPLOYMENT

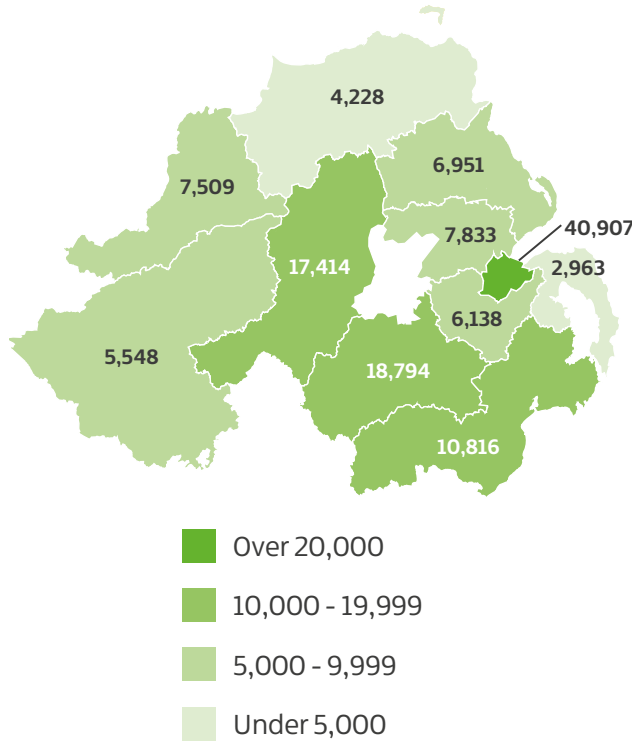
EMPLOYMENT BY OWNERSHIP 2020-2024



EMPLOYMENT BY COMPANY SIZE 2024



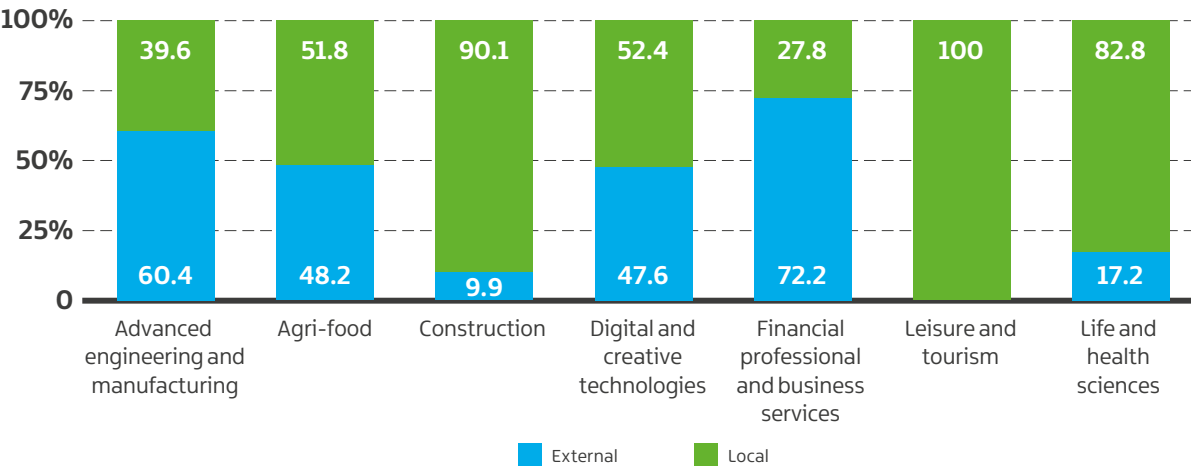
EMPLOYMENT BY COUNCIL AREA 2024



Life and health sciences was the fastest growing sector, increasing by 3,297 jobs between 2020 and 2024



EMPLOYMENT BY OWNERSHIP AND SECTOR 2024

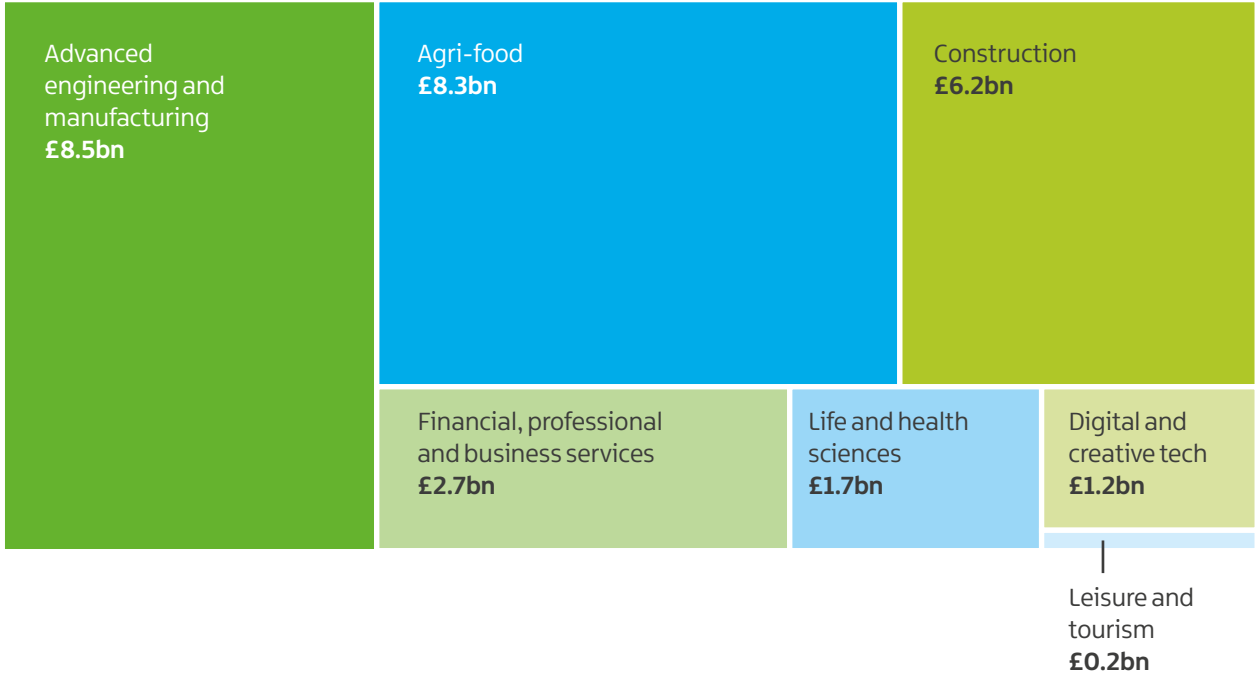


SALES



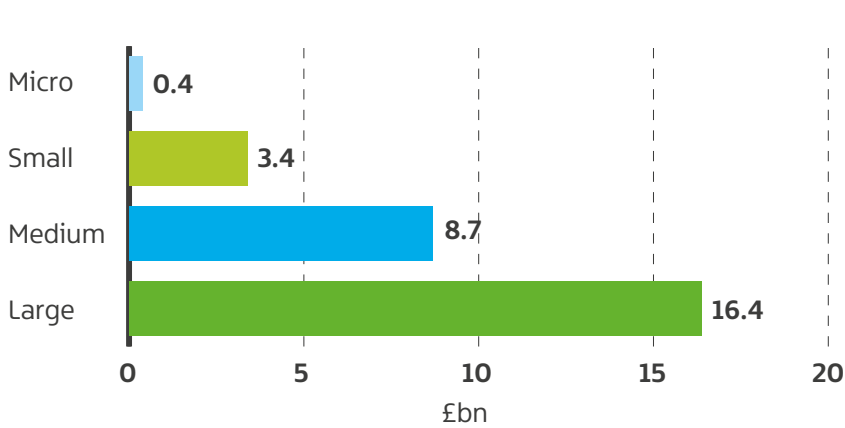
SALES BY SECTOR

2024



SALES BY COMPANY SIZE

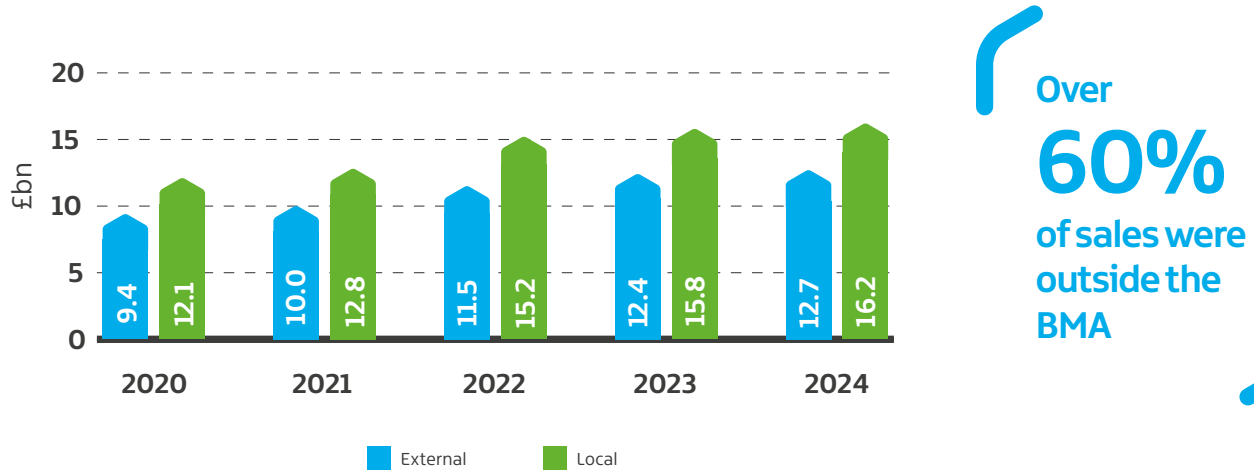
2024



Sales in the agri-food sector have increased by almost **£2.4bn** this is the largest sectoral increase over the period

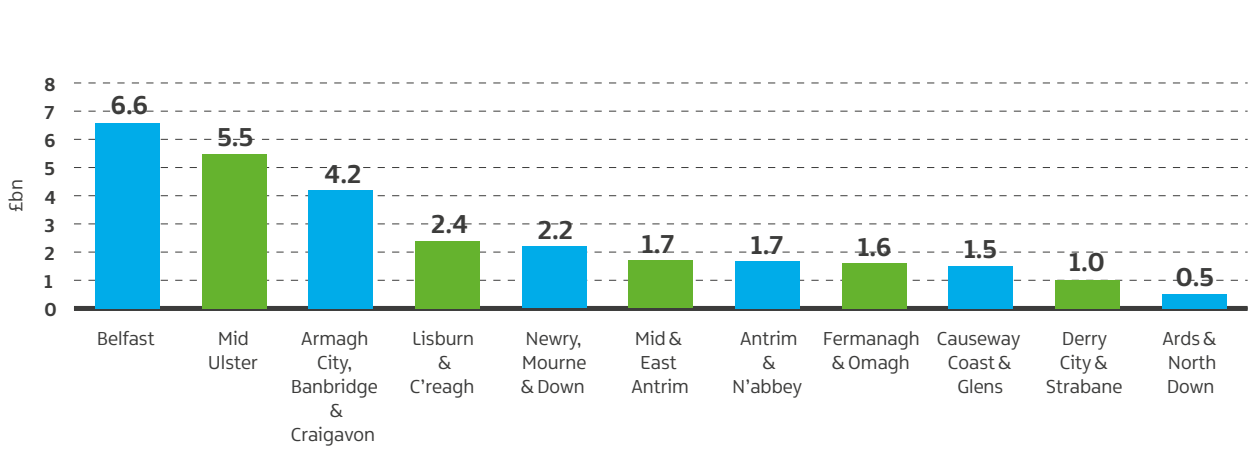
SALES BY OWNERSHIP

2020-2024



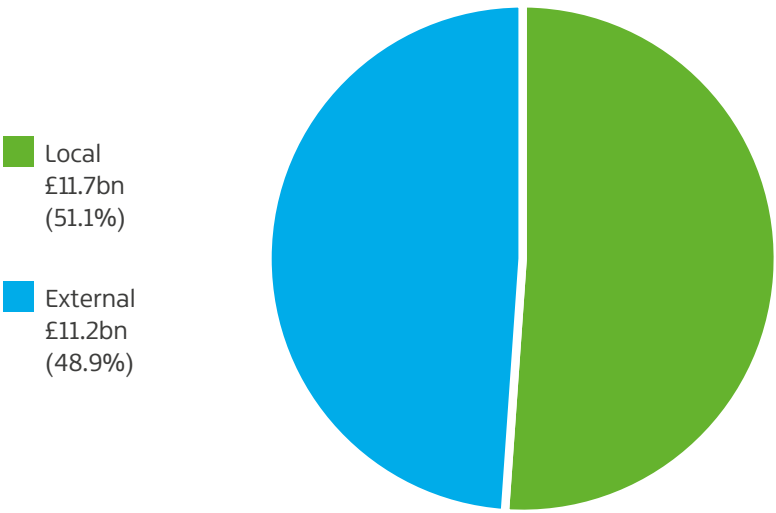
SALES BY COUNCIL AREA

2024

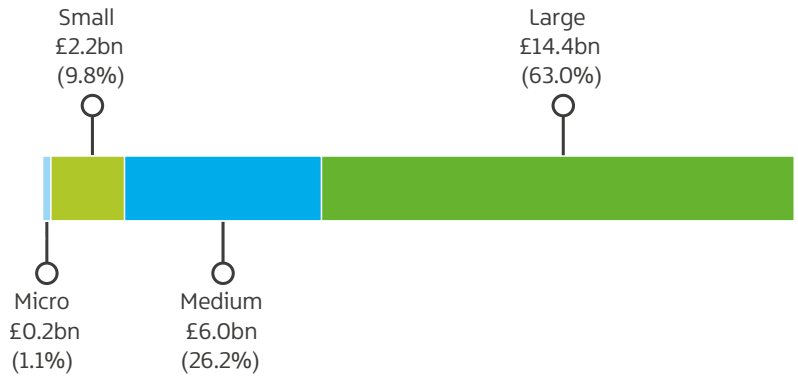


EXTERNAL SALES

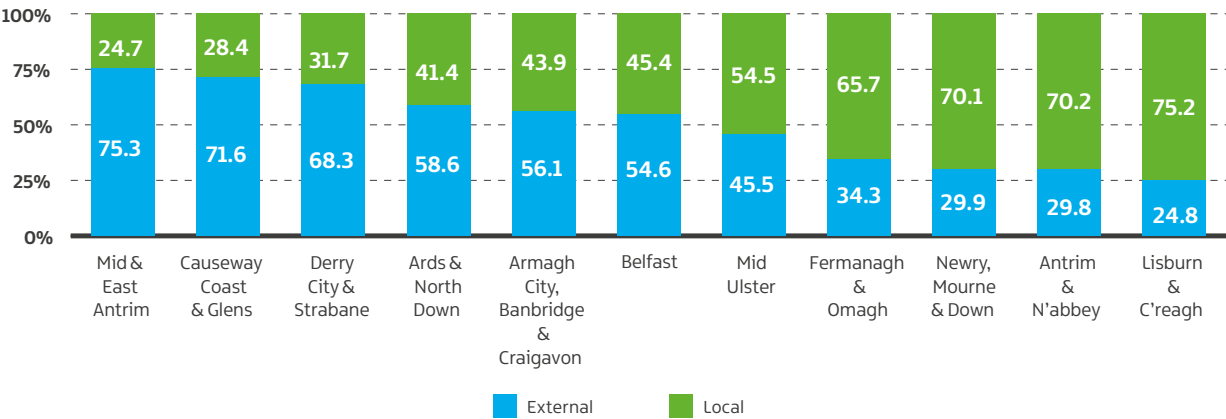
EXTERNAL SALES BY OWNERSHIP 2024



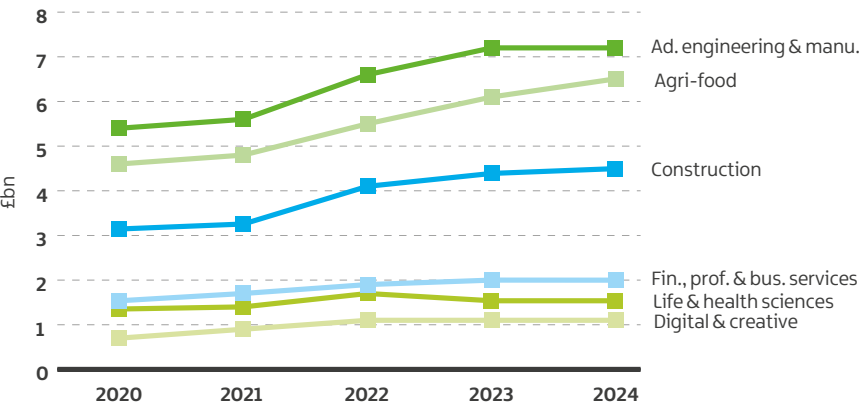
EXTERNAL SALES BY COMPANY SIZE 2024



EXTERNAL SALES BY COUNCIL AREA AND OWNERSHIP 2024



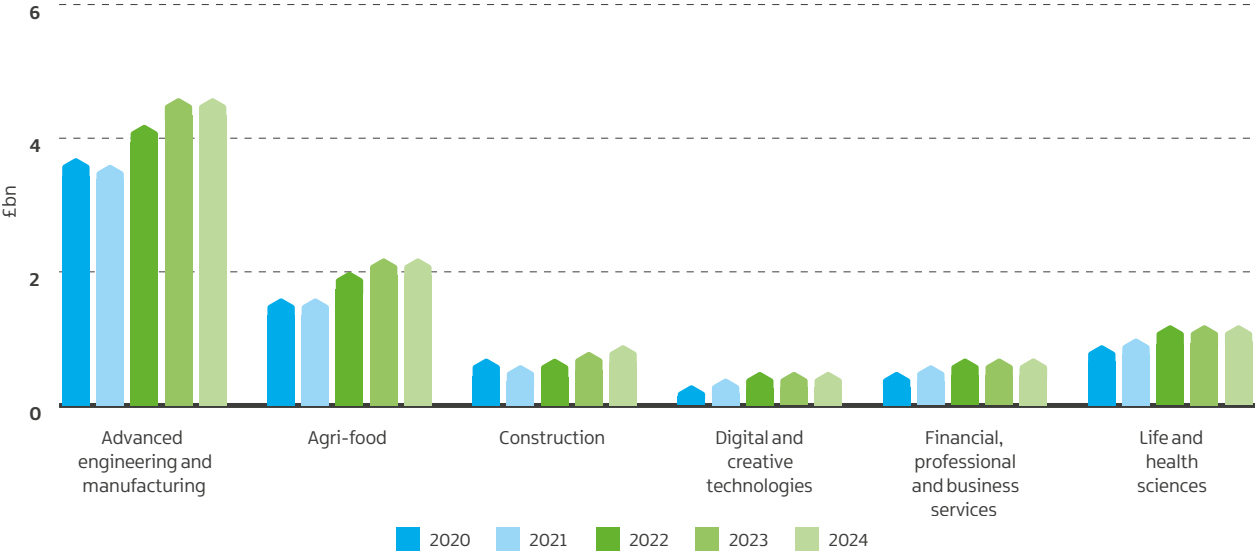
EXTERNAL SALES BY SECTOR 2020-2024



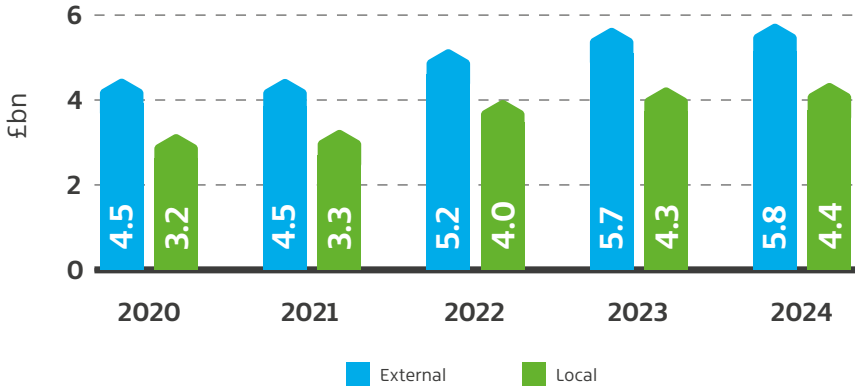
From 2020 to 2024 the advanced engineering and manufacturing sector was the largest contributing sector. In 2024 it accounted for **32%** of external sales

EXPORTS

EXPORTS BY SECTOR 2020-2024

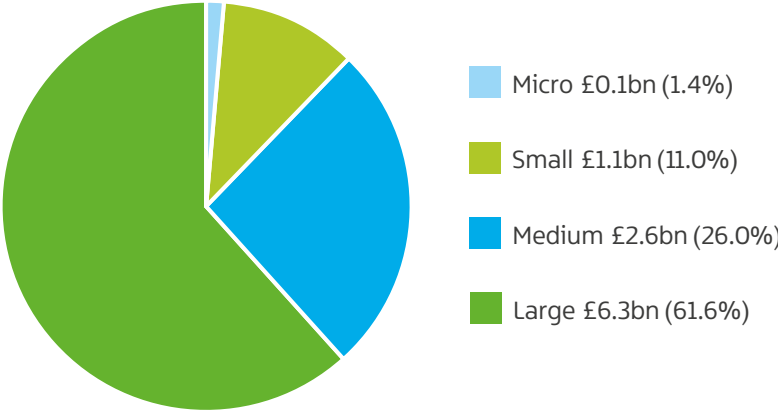


EXPORTS BY OWNERSHIP 2020-2024

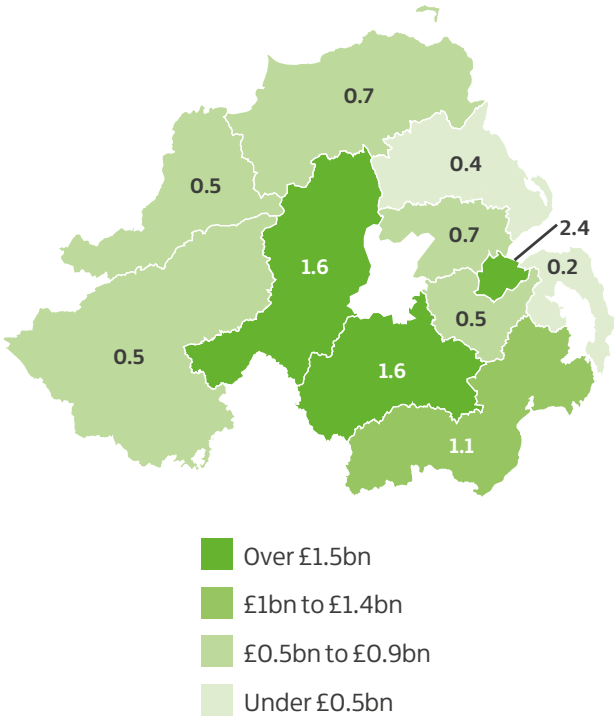


63%
of exports
were outside
the BMA

EXPORTS BY COMPANY SIZE 2024



EXPORTS BY COUNCIL AREA 2024



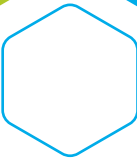
Causeway Coast and
Glens has seen the
largest percentage
increase in exports
from 2020 - 2024

72%

INVEST NI

INVESTMENT ACTIVITY

OVERVIEW 2020/21 TO 2024/25



| 10,198 investments | | | | | | | |
|--------------------------------------------|-------------------------------------|---------------------------------|----------------------------|---------------------------------|----------------------------------------------|----------------------------|--------------------------------|
| Driving global ambition and overseas trade | Productive investment and good jobs | Investing in innovation and R&D | Access to finance | Entrepreneurship and enterprise | Investing in leadership, training and skills | Covid | Net zero and the green economy |
| 1,784 | 1,166 | 3,097 | 783 | 603 | 704 | 1,105 | 956 |
| Assistance offered £47m | Assistance offered £76m | Assistance offered £125m | Assistance offered £92m | Assistance offered £23m | Assistance offered £29m | Assistance offered £28m | Assistance offered £14m |
| Total investment £565m | Total investment £632m | Total investment £536m | Total investment £375m | Total investment £181m | Total investment £115m | Total investment £64m | Total investment £46m |
| Jobs 7,531 | Jobs 5,775 | Jobs 1,336 | Jobs — | Jobs 2,317 | Jobs — | Jobs 15 | Jobs — |

LOCALLY-OWNED

| Number of investments | Assistance offered | Total investment | Jobs |
|-----------------------|--------------------|------------------|-------|
| 9,492 | £324m | £1,568m | 8,374 |

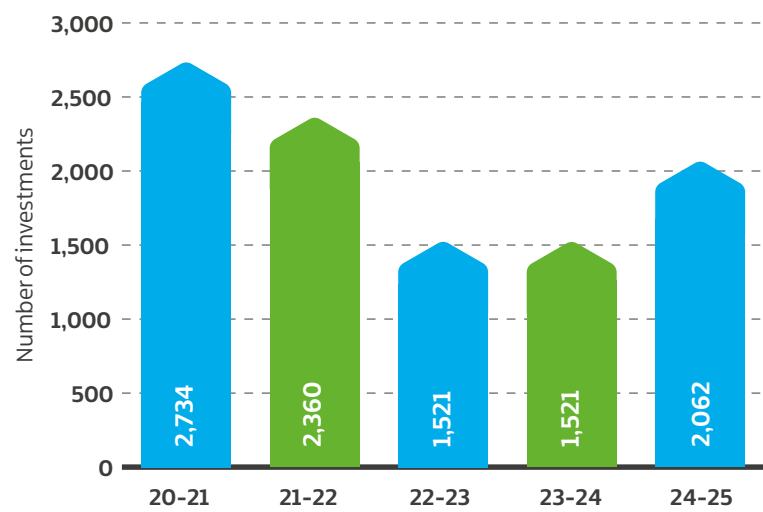
EXTERNALLY-OWNED

| Number of investments | Assistance offered | Total investment | Jobs |
|-----------------------|--------------------|------------------|-------|
| 706 | £111m | £946m | 8,600 |

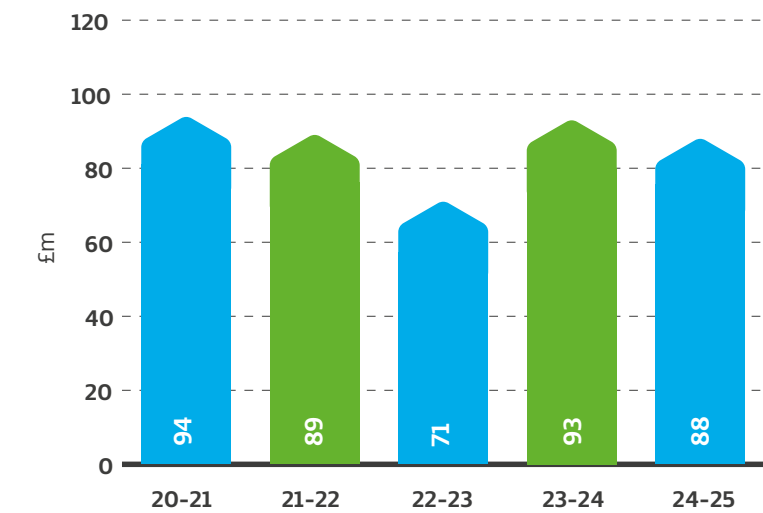


TOTAL SUPPORT

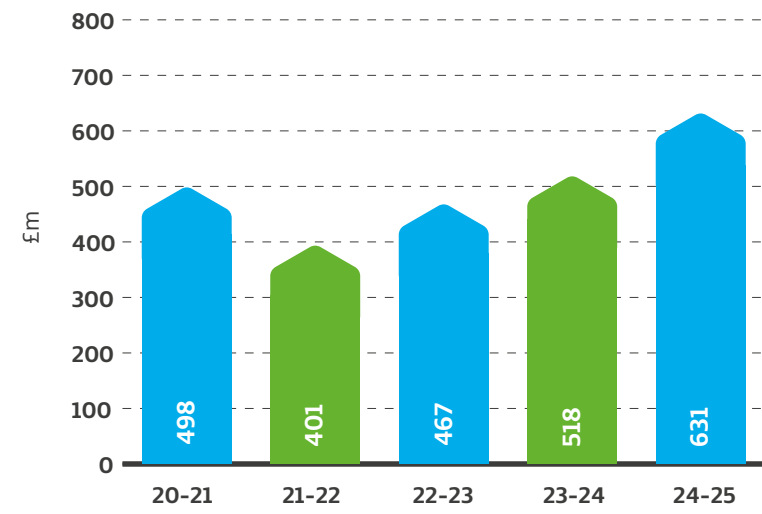
NUMBER OF INVESTMENTS 2020-21 to 2024-25



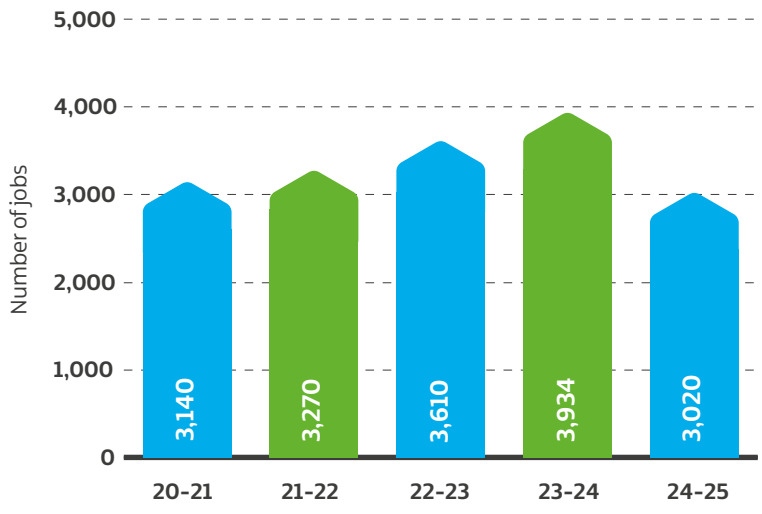
ASSISTANCE OFFERED 2020-21 to 2024-25



TOTAL INVESTMENT 2020-21 to 2024-25



NEW JOBS 2020-21 to 2024-25

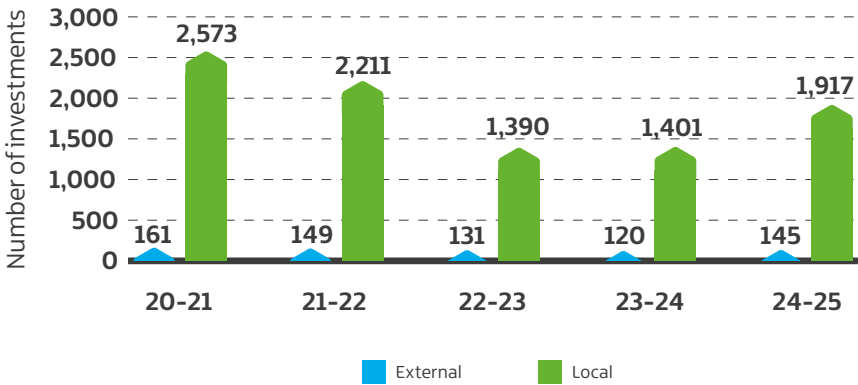


During the past five years:

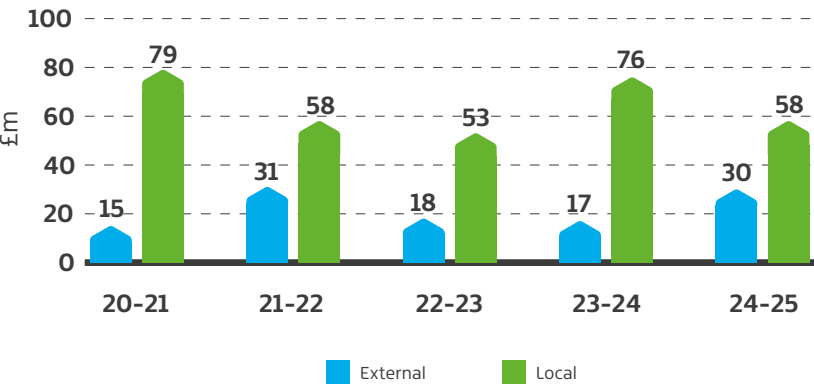
- We supported over **10,000** investments totalling **£434m** of assistance.
- Our assistance contributed towards over **£2.5bn** of investment commitments that will lead to the creation of **16,974** new jobs.
- We offered **29%** of assistance to projects investing in Innovation & R&D.
- Locally owned businesses accounted for **93%** of the investments we supported and **75%** of the assistance we offered.
- The largest sector in terms of our support was Advanced Engineering & Manufacturing with **30%** (**£123m**) of overall assistance offered.
- **57%** of the Investments we supported were by businesses that are located outside of the Belfast Metropolitan Area (BMA) or are remote working projects.
- **92%** of the investments we supported were by small to medium sized enterprises (SMEs).

OWNERSHIP

NUMBER OF INVESTMENTS 2020-21 to 2024-25

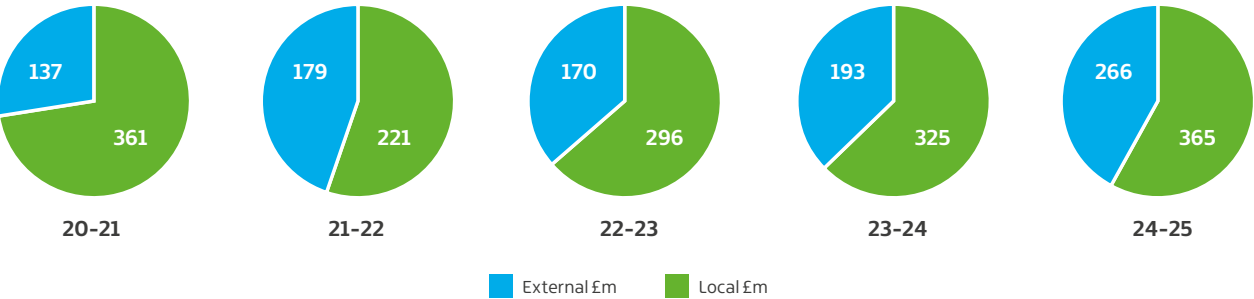


ASSISTANCE OFFERED 2020-21 to 2024-25

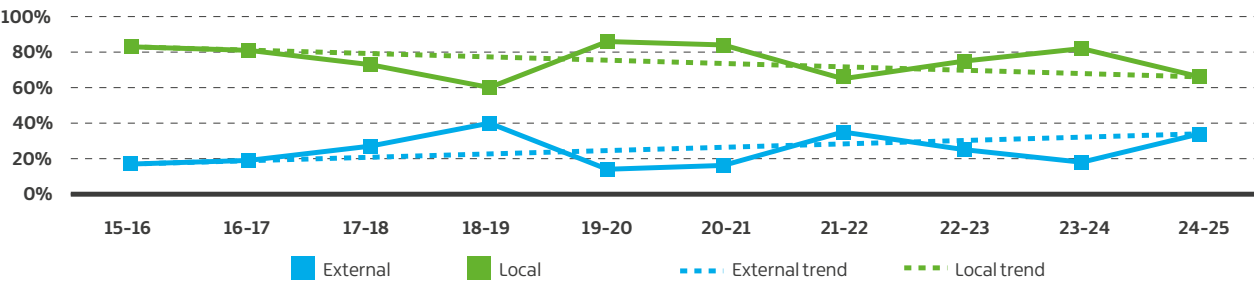


93%
of the investments
were by locally-
owned businesses

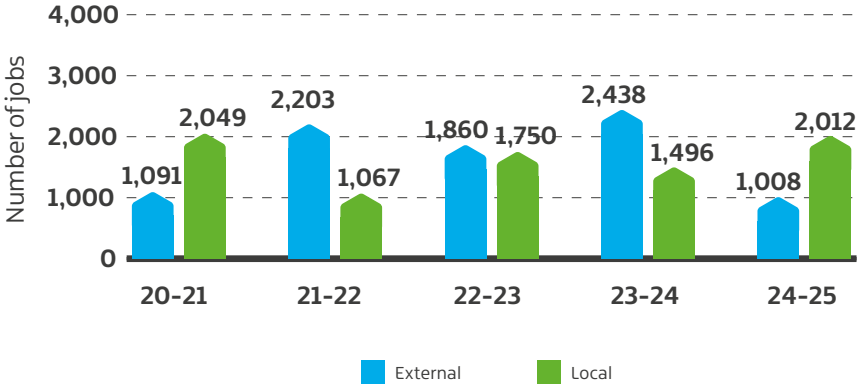
TOTAL INVESTMENT 2020-21 to 2024-25



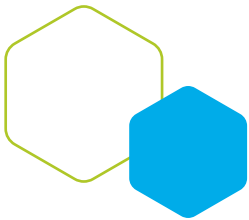
ASSISTANCE OFFERED 10 YEAR TREND 2015-16 to 2024-25



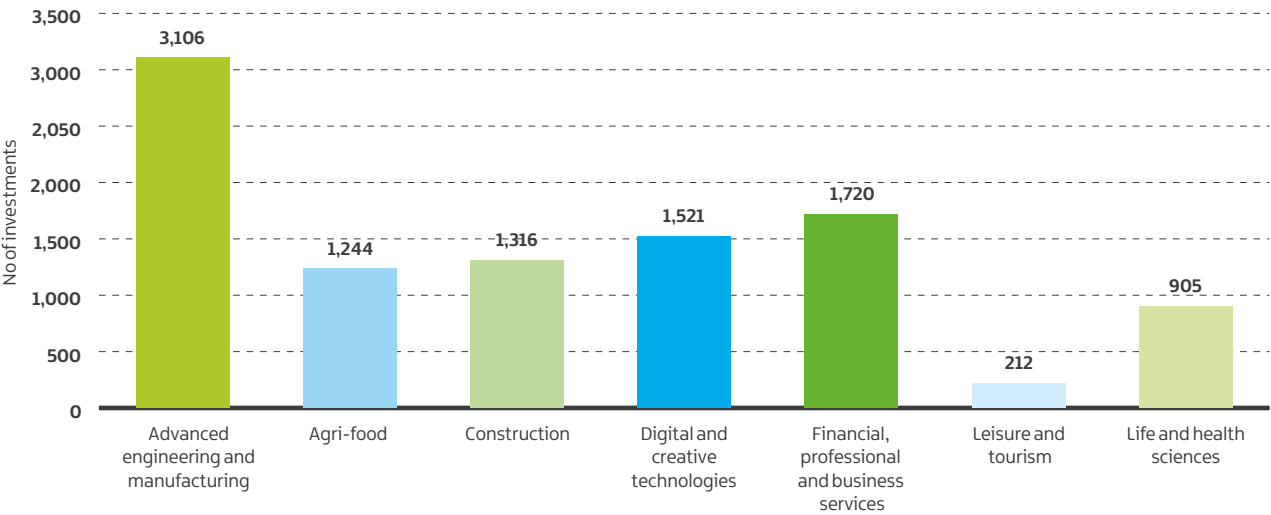
NEW JOBS 2020-21 to 2024-25



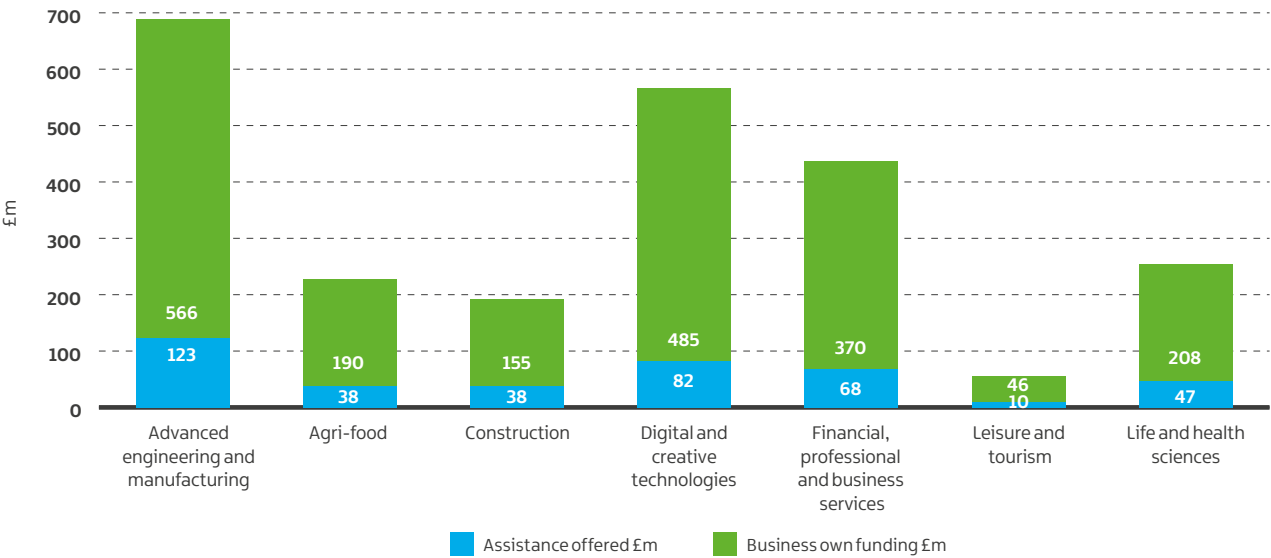
SECTOR



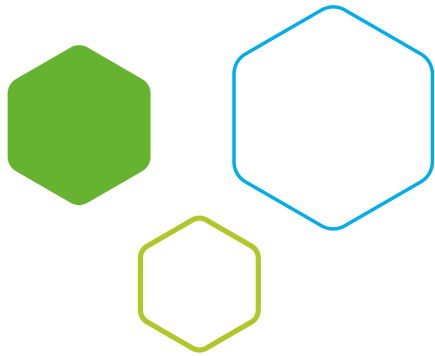
NUMBER OF INVESTMENTS 2020-21 to 2024-25



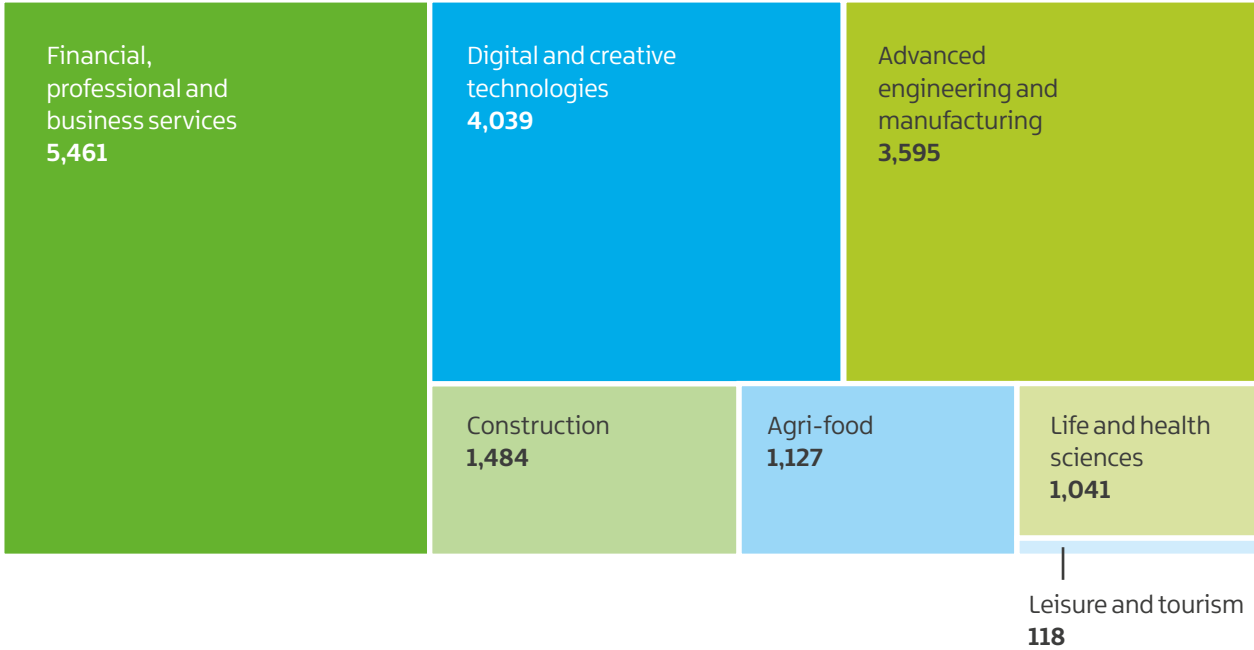
ASSISTANCE OFFERED AND TOTAL INVESTMENT 2020-21 to 2024-25



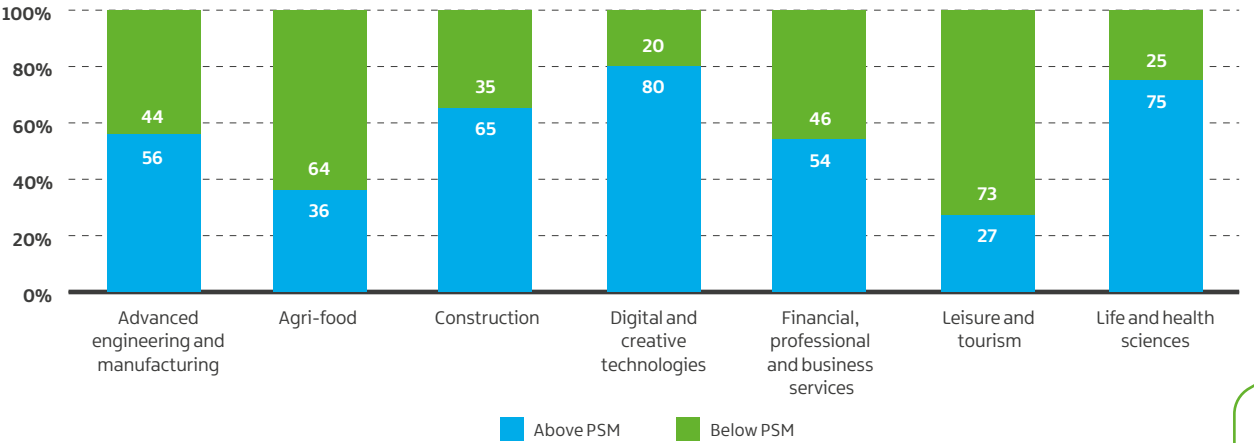
30%
of investment was in the
advanced engineering and
manufacturing sector



NEW JOBS 2020-21 to 2024-25

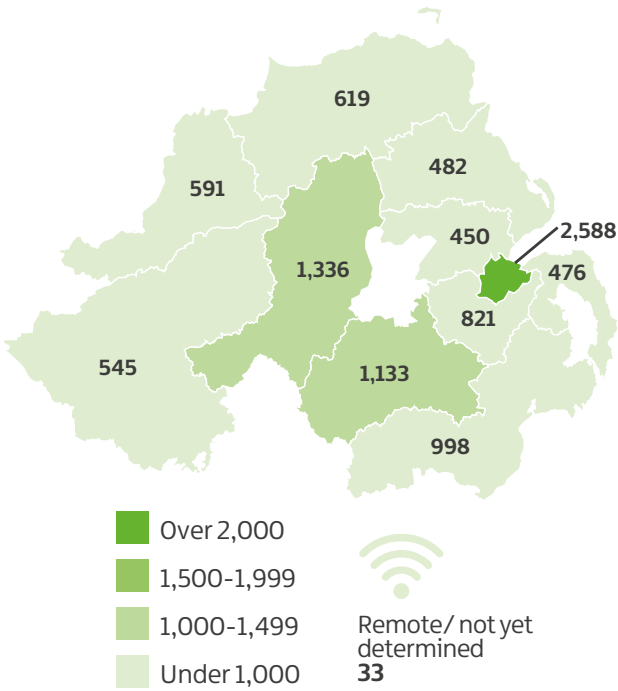


NEW JOBS WITH SALARIES ABOVE NI PRIVATE SECTOR MEDIAN WAGE (PSM) 2020-21 to 2024-25

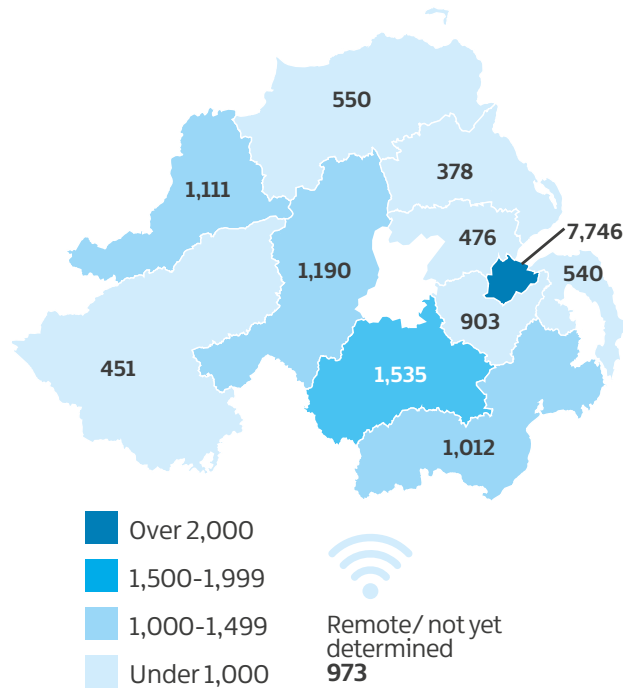


COUNCIL AREA

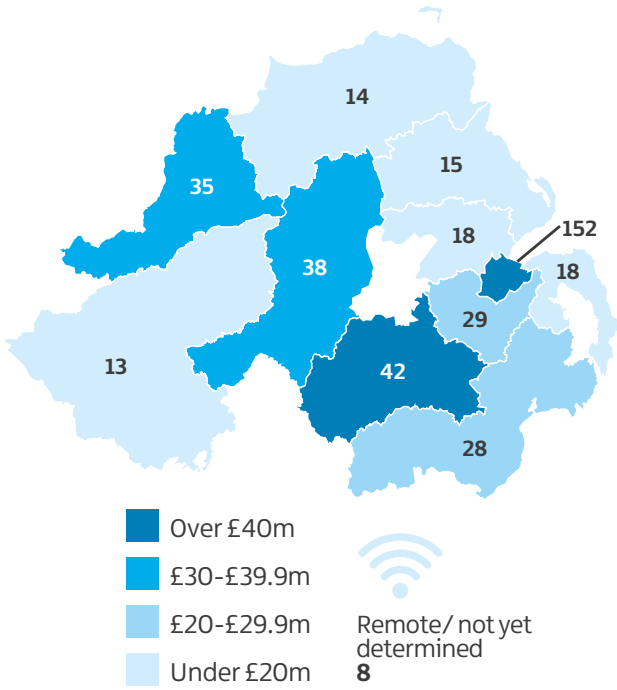
NUMBER OF INVESTMENTS
2020-21 to 2024-25



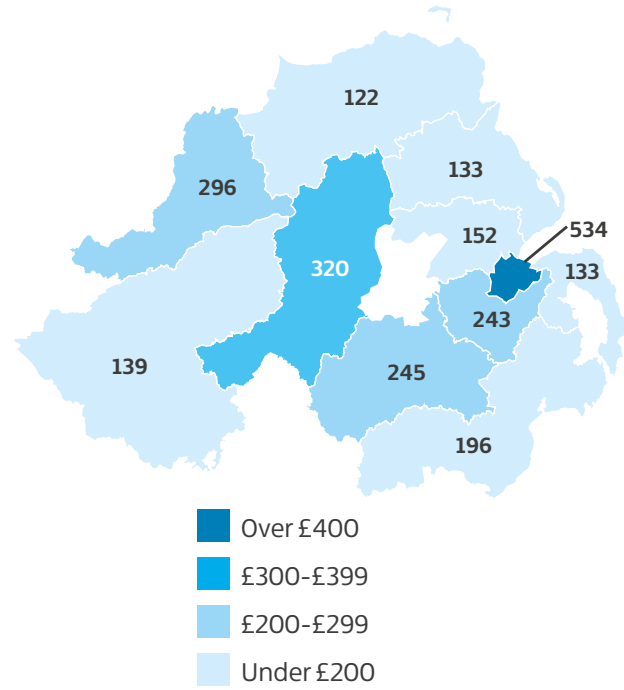
NEW JOBS
2020-21 to 2024-25



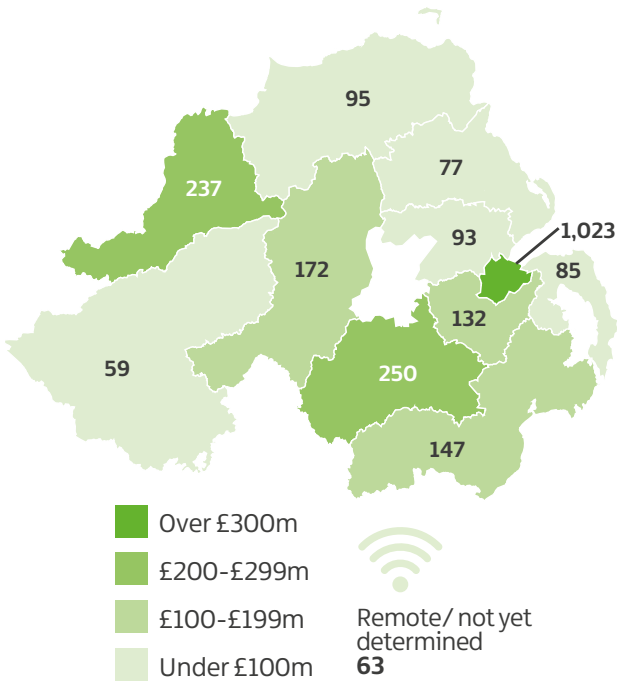
ASSISTANCE OFFERED
2020-21 to 2024-25



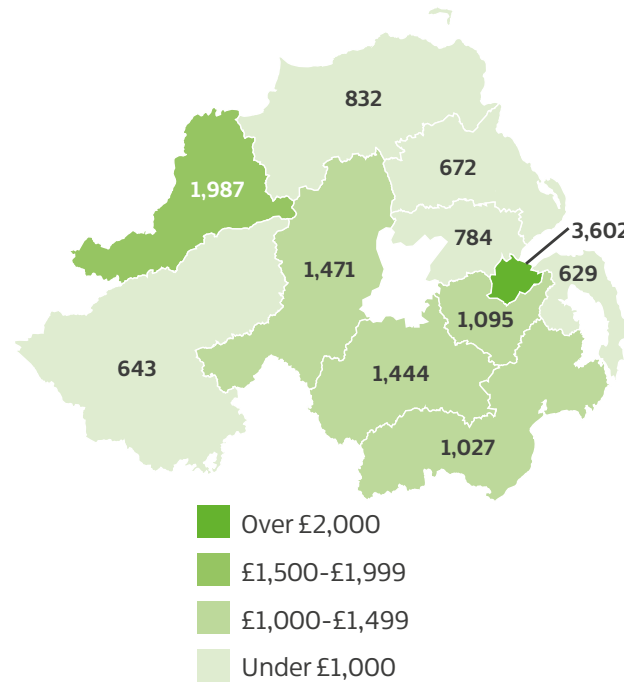
ASSISTANCE OFFERED PER HEAD
2020-21 to 2024-25



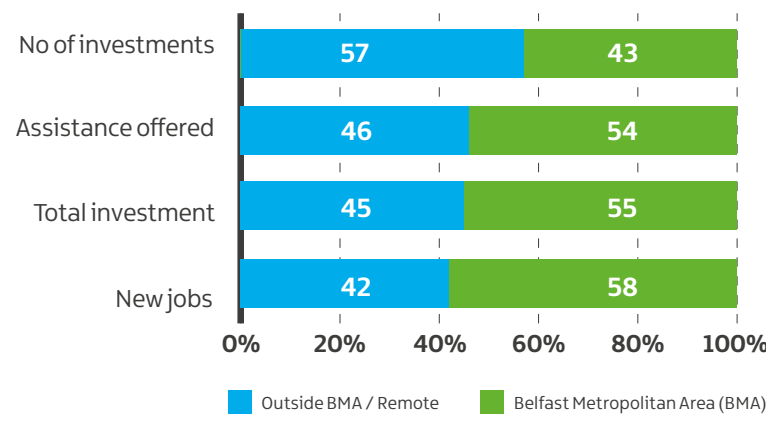
TOTAL INVESTMENT
2020-21 to 2024-25



TOTAL INVESTMENT PER HEAD
2020-21 to 2024-25



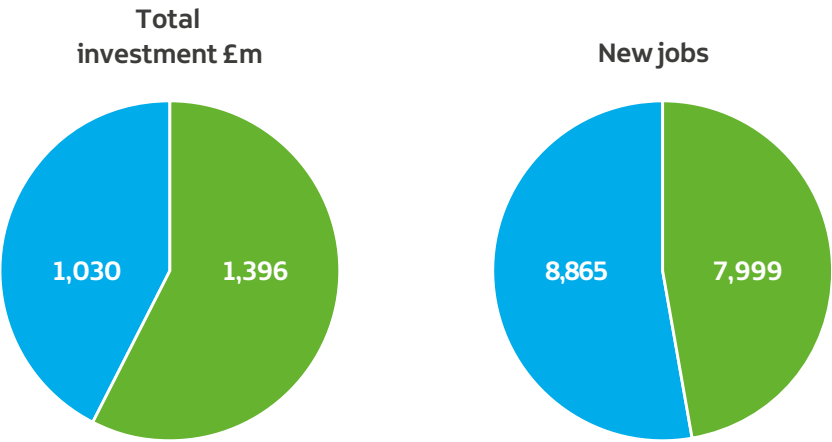
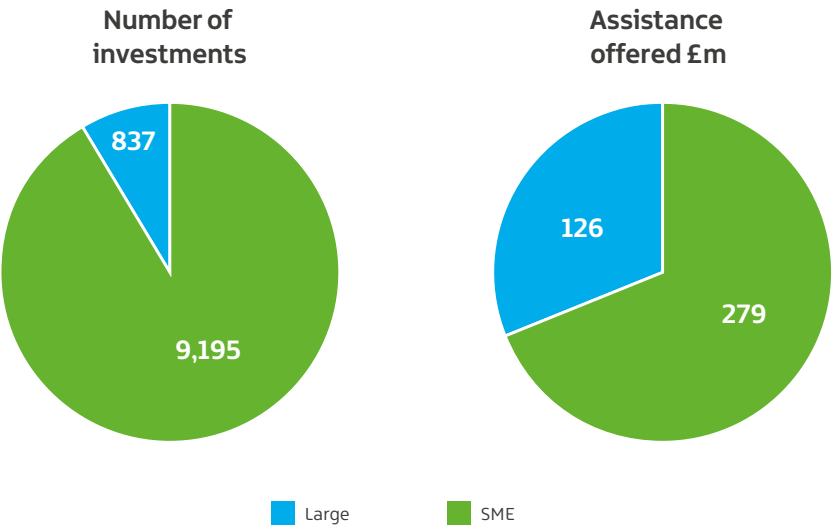
INVEST NI SUPPORT BY AREA
2020-21 to 2024-25



57%
of investments
were outside the
BMA or remote
working projects

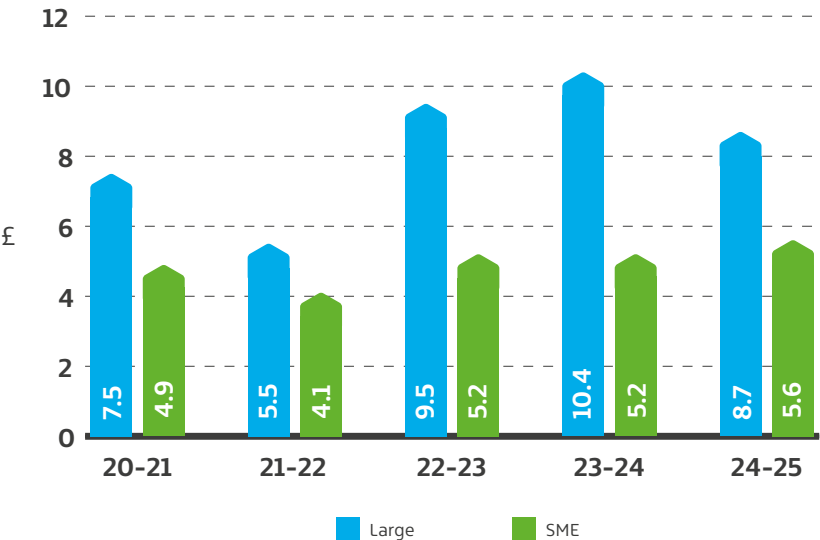
COMPANY SIZE

INVEST NI SUPPORT BY COMPANY SIZE 2020-21 to 2024-25



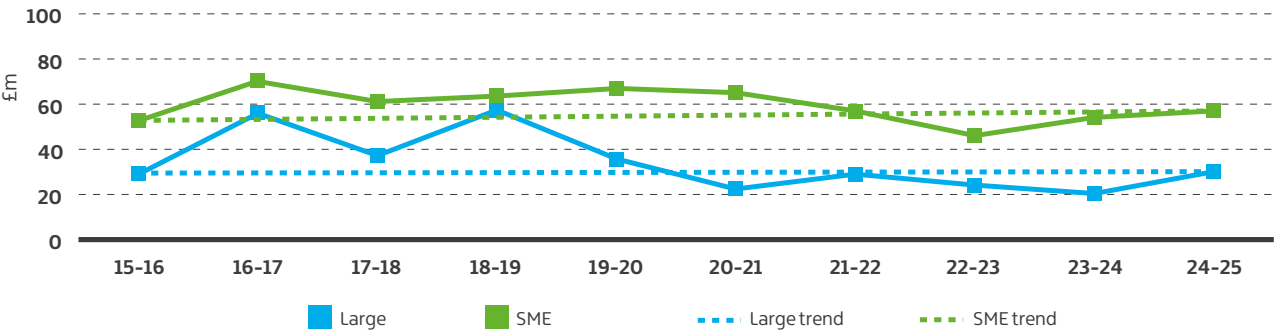
92%
of the investments
we supported
were by SME's

£ OF INVESTMENT IN ECONOMY PER £ OF ASSISTANCE 2020-21 to 2024-25



NOTE: Investment includes the assistance we offered.

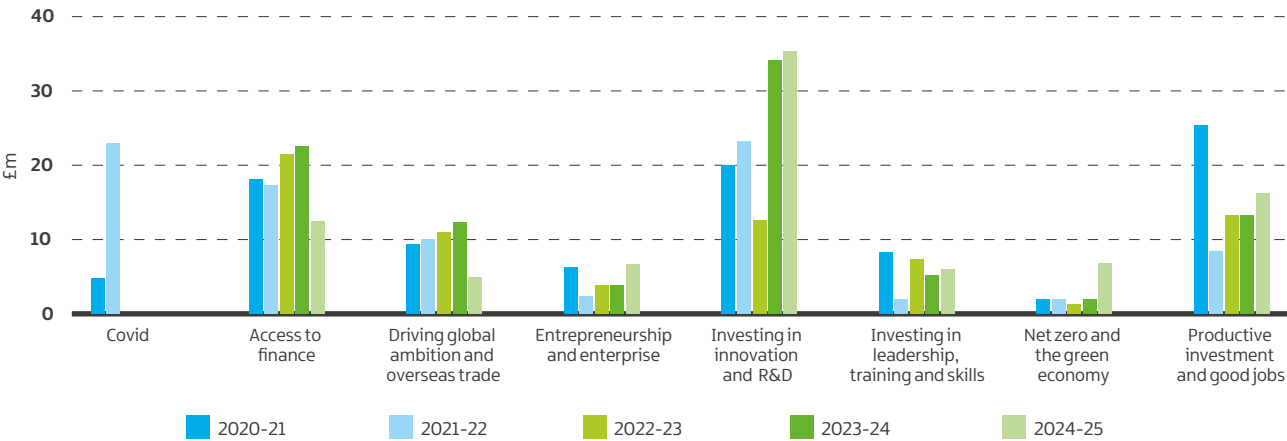
ASSISTANCE OFFERED 10 YEAR TREND 2015-16 to 2024-25



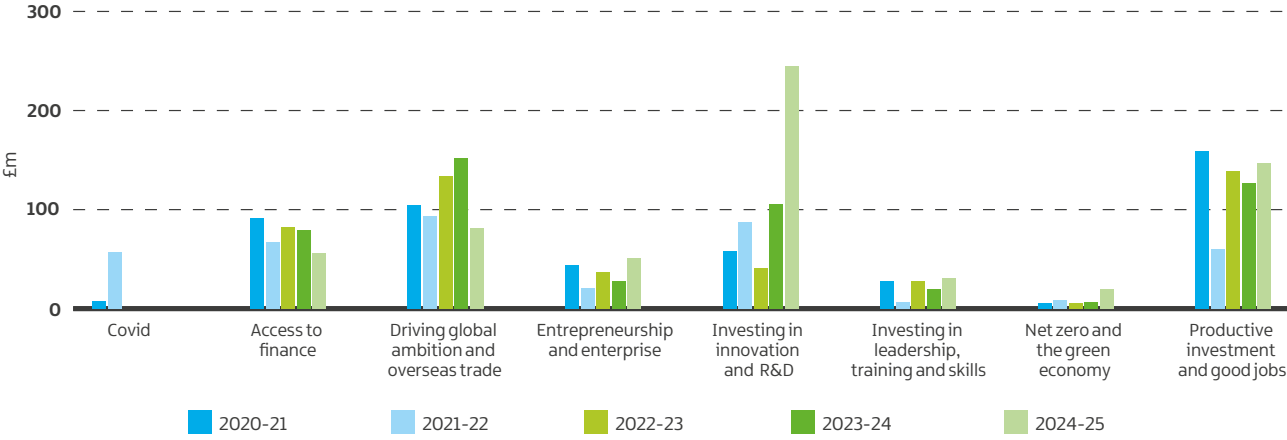
TYPE OF SUPPORT



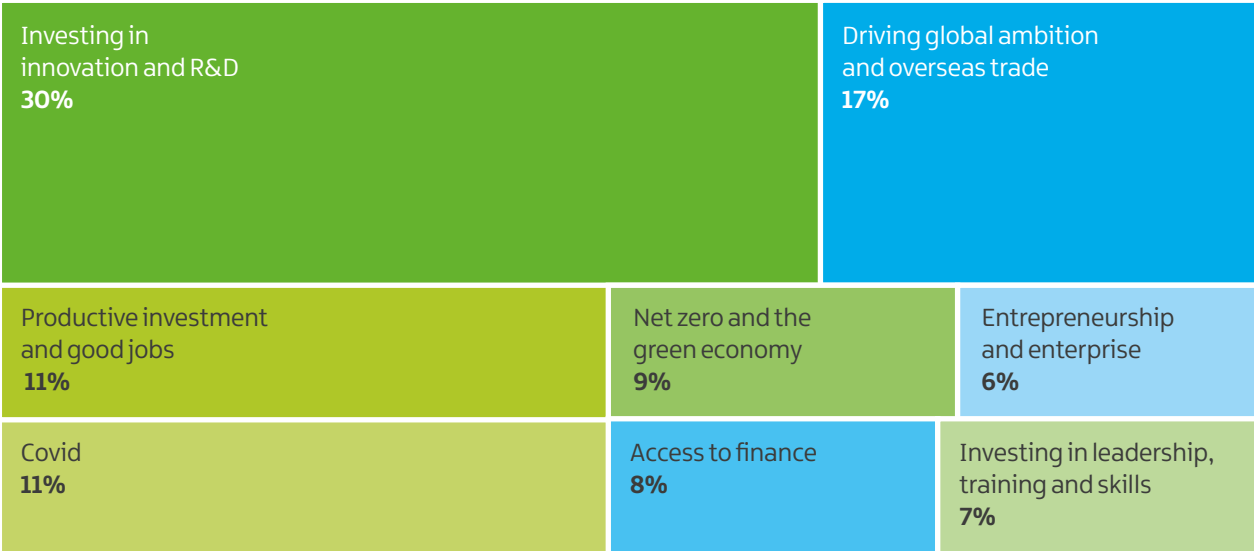
ASSISTANCE OFFERED 2020-21 to 2024-25



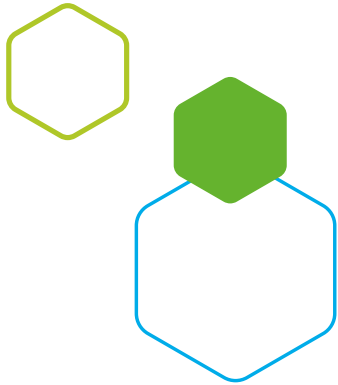
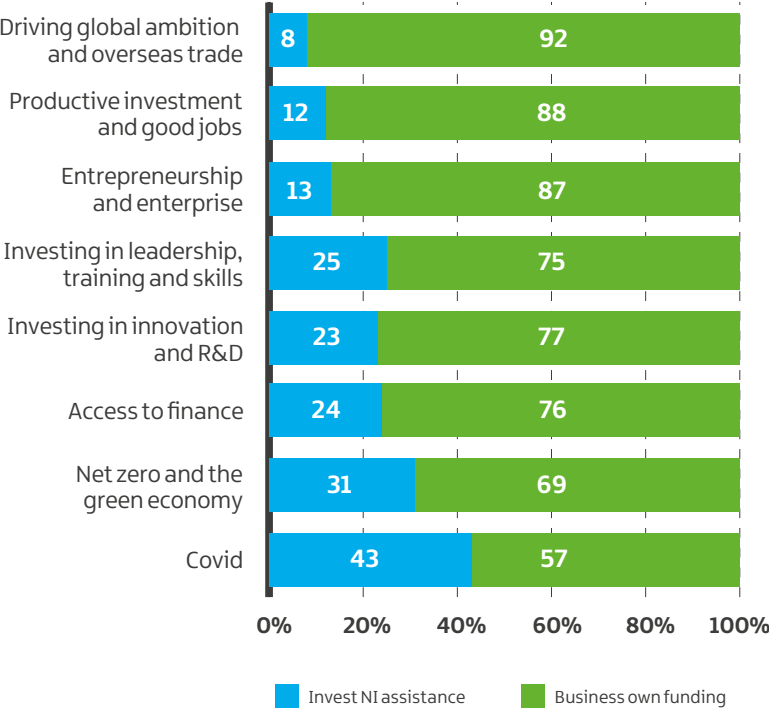
TOTAL INVESTMENT 2020-21 to 2024-25



PERCENTAGE OF INVESTMENTS 2020-21 to 2024-25



PROJECT CONTRIBUTION RATE 2020-21 to 2024-25

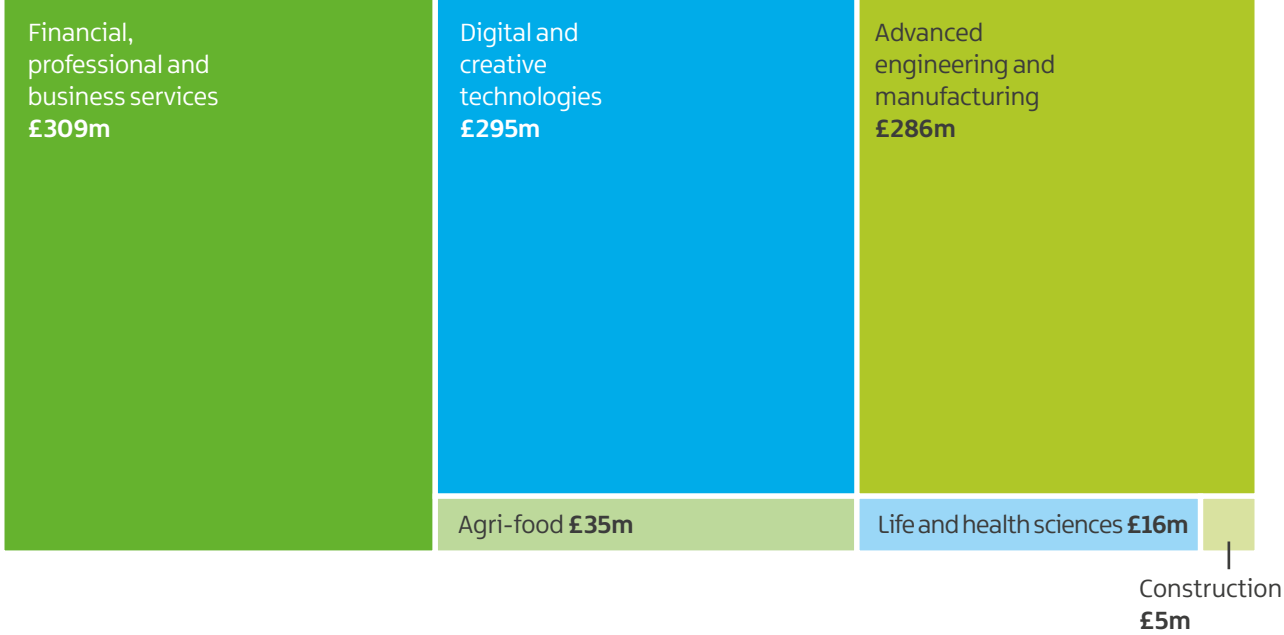


IMPACT OF EXTERNAL BUSINESSES

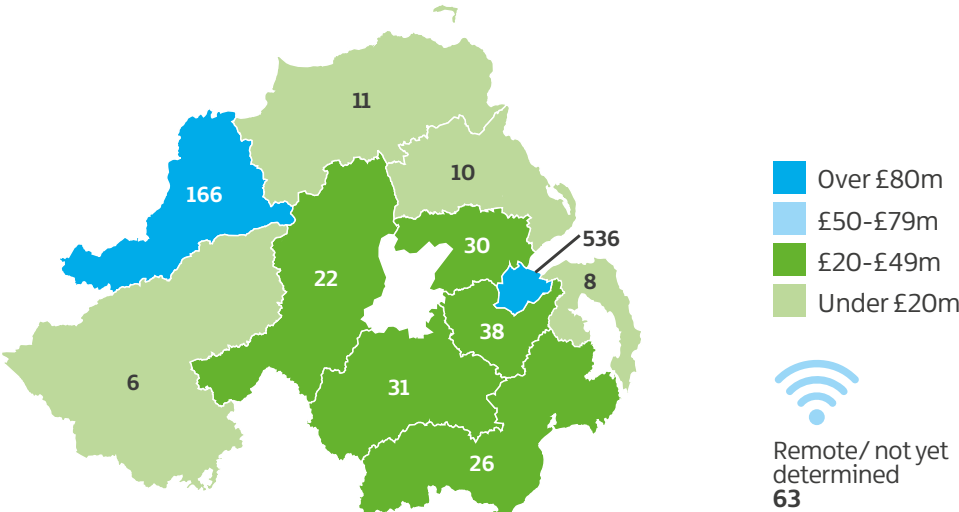
KEY VARIABLES 2020-21 to 2024-25



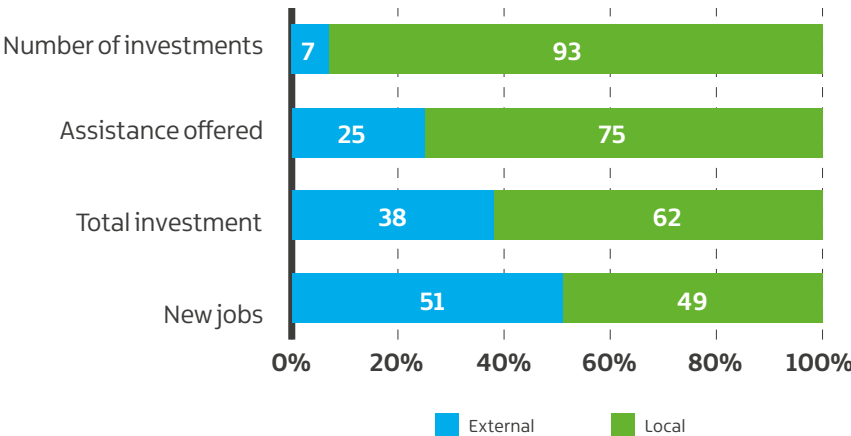
TOTAL INWARD INVESTMENT BY SECTOR 2020-21 to 2024-25



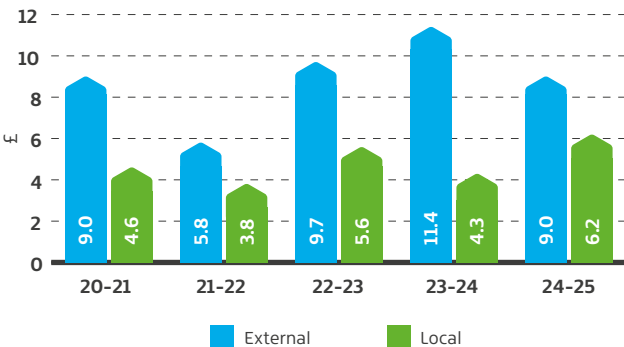
TOTAL INWARD INVESTMENT BY COUNCIL 2020-21 to 2024-25



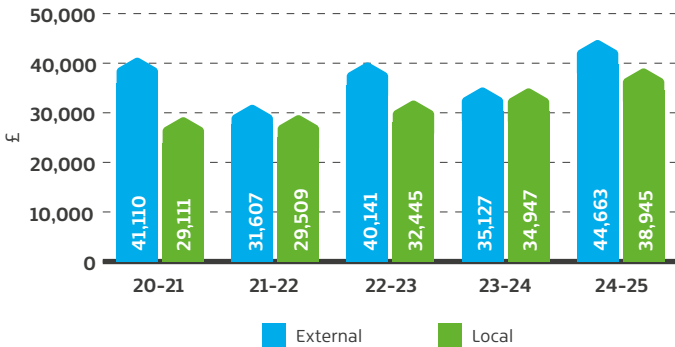
INVEST NI SUPPORT BY OWNERSHIP 2020-21 to 2024-25



£ OF INVESTMENT IN ECONOMY PER £ OF ASSISTANCE 2020-21 to 2024-25



AVERAGE SALARY £ BY OWNERSHIP 2020-21 to 2024-25



DEVELOPING AND ACHIEVING SUSTAINABILITY

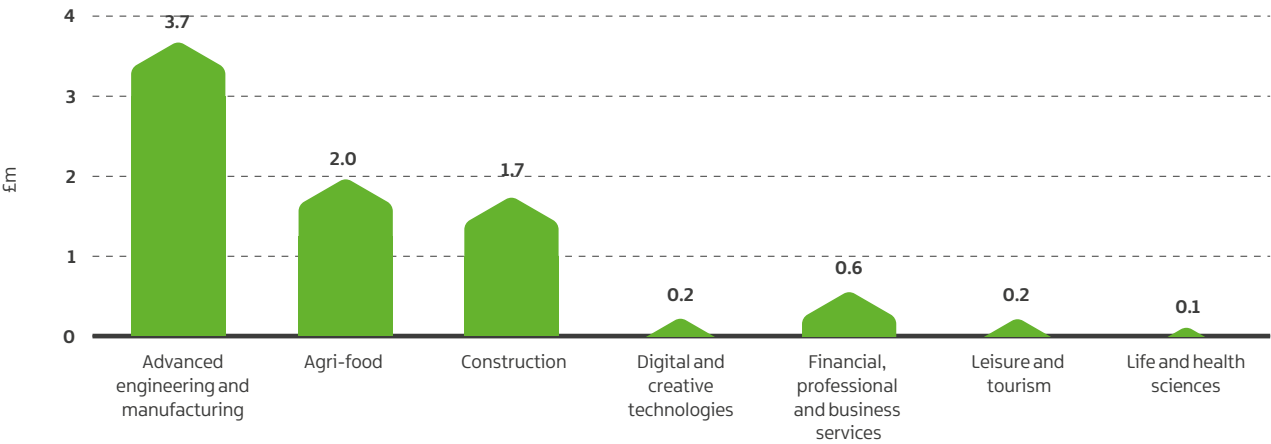
NET ZERO (support for energy and resource efficiency technologies)

KEY VARIABLES 2023-24 to 2024-25



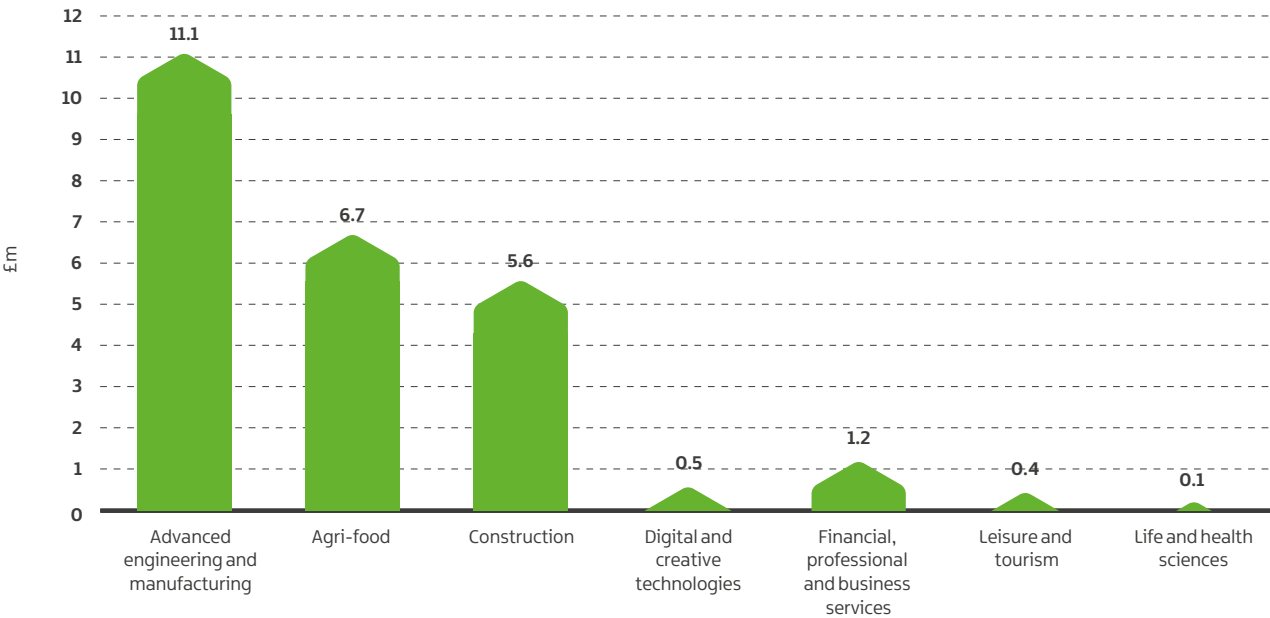
ASSISTANCE OFFERED BY SECTOR 2023-24 to 2024-25

Energy and resource efficiency technologies support by sector



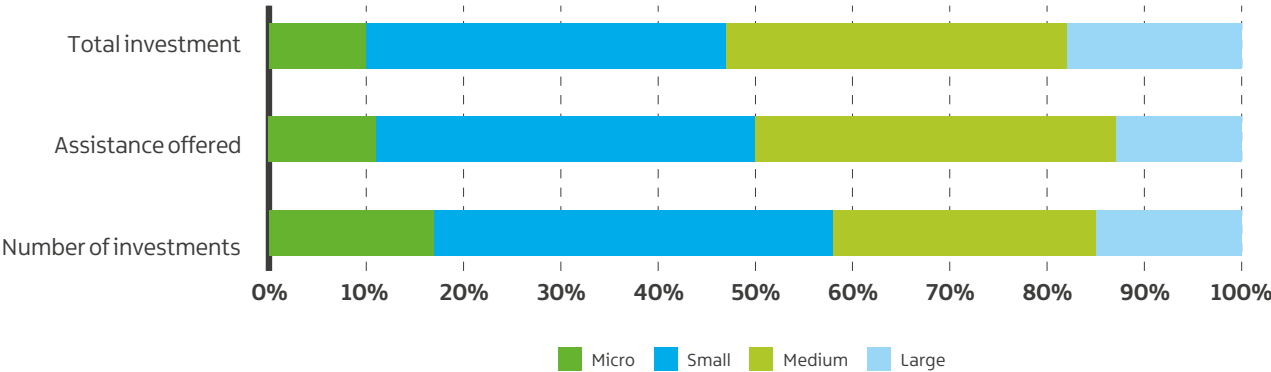
TOTAL INVESTMENT BY SECTOR 2023-24 to 2024-25

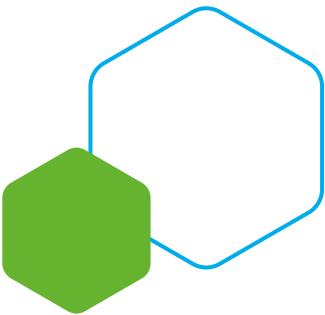
Energy and resource efficiency technologies support by sector



INVEST NI SUPPORT BY BUSINESS SIZE 2023-24 to 2024-25

Energy and resource efficiency technologies support by business size





GREEN ECONOMY

(support to diversify into low carbon and green economy)

KEY VARIABLES

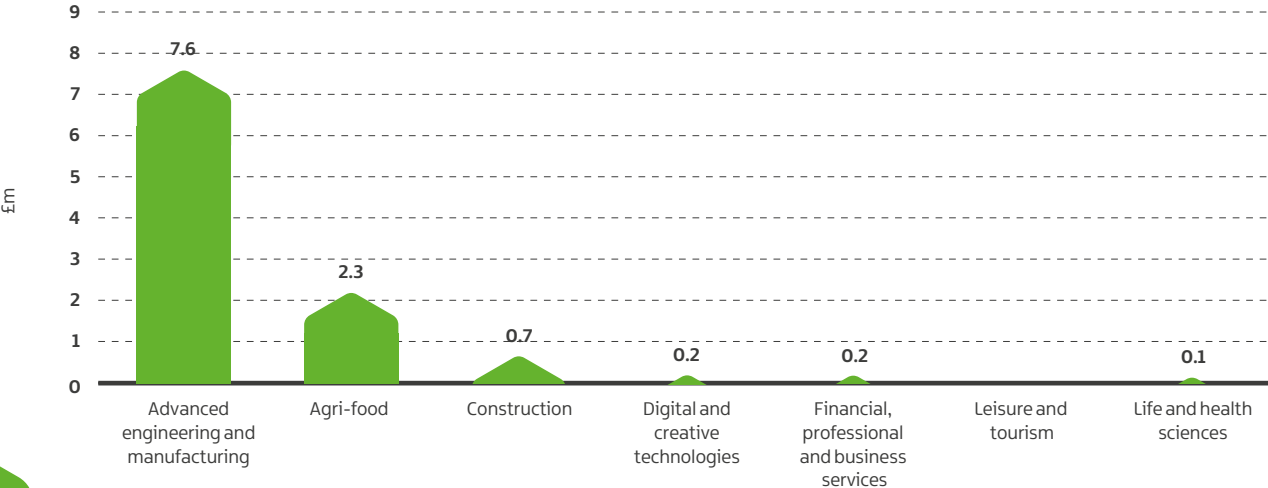
2023-24 to 2024-25



ASSISTANCE OFFERED BY SECTOR

2023-24 to 2024-25

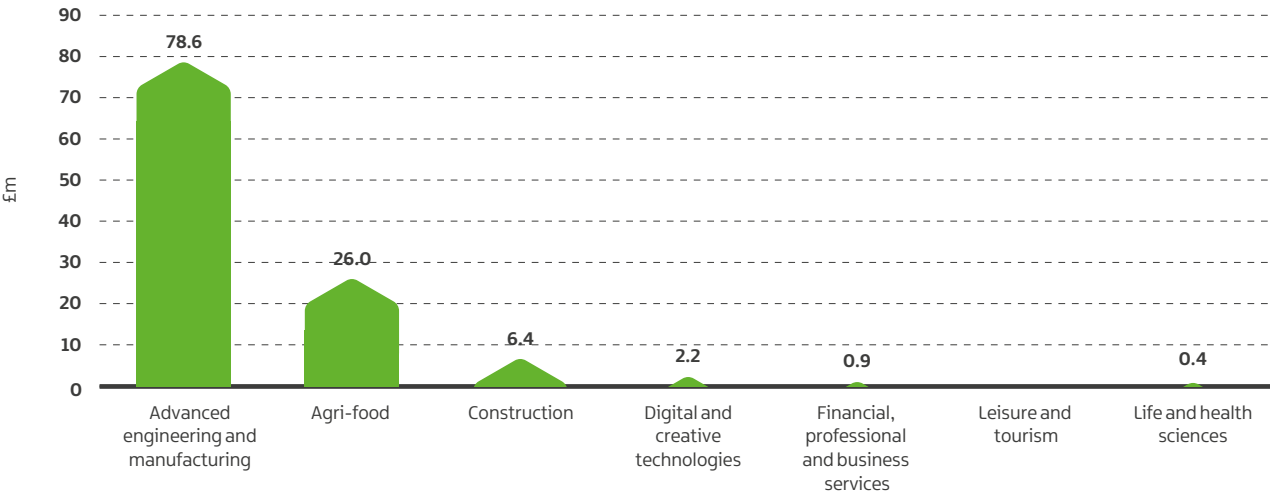
Low carbon and green economy support by sector



TOTAL INVESTMENT BY SECTOR

2023-24 to 2024-25

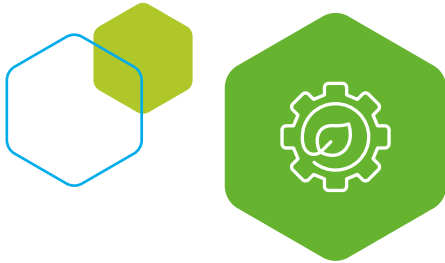
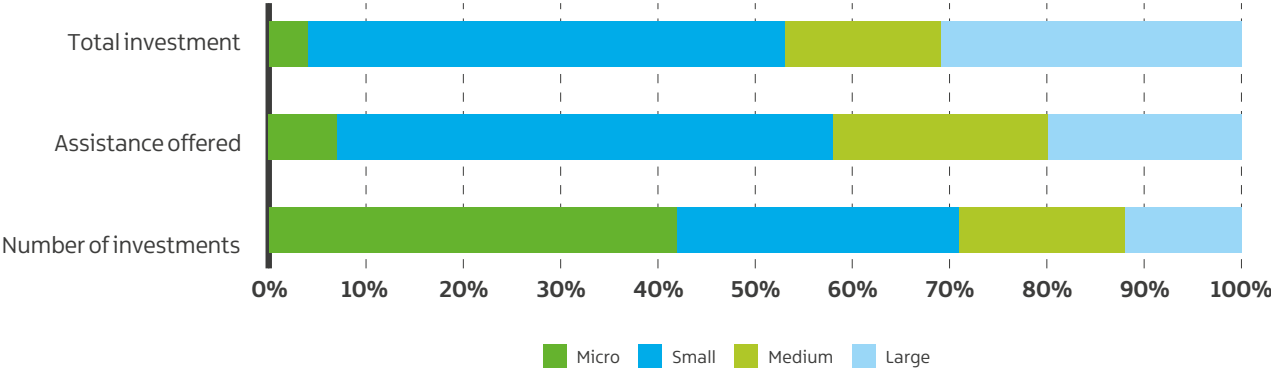
Low carbon and green economy support by sector



INVEST NI SUPPORT BY BUSINESS SIZE

2023-24 to 2024-25

Low carbon and green economy support by business size



BACKGROUND NOTES

CPI SECTION

The client performance indicators section is based on the 2020 to 2024 calendar years.

- The 2024 CPI survey sampled 1,541 businesses.
- The CPI sample accounts for the large majority of all our supported businesses. The survey is a census of all these businesses and aims to achieve a response rate of 100%. Approximately 20% of non-responding businesses are estimated for each year.
- The CPI sample is constantly changing, as businesses fall on or off depending on whether or not we are currently engaging with them at the time the survey is collected. Additionally, new to NI businesses will be included providing they have been trading for more than 18 months whilst businesses entering administration will be removed.
- The values in this document refer to the total value of employment, sales, external sales and exports recorded by all businesses on the CPI portfolio in each of the years referenced.
- Businesses are asked to provide financial data for the relevant calendar year. Where calendar year data are not recorded, accounts ending during the year are acceptable.
- Leisure and tourism businesses are not asked to provide details for external sales or exports. Although many of their customers originate outside NI, the goods and services are sold within NI and they are therefore not considered to have external sales.

INVESTMENT ACTIVITY SECTION

The investment activity section is based on the 2020-21 to 2024-25 financial years.

- The data in this section relate to all our supported projects, some of which are specifically aimed at job creation, whilst others are not. Therefore, any attempt to produce cost per job calculations from these data will result in inaccurate information.
- Council area figures and analysis excludes support to external delivery organisations and universities as this support benefits businesses across Northern Ireland.
- Per head figures are based on adult population from 2023 mid-year population estimates.
- We publish provisional performance results on an annual basis. New information may become available following publication; however, results are frozen at the time of release and only revised when subsequent year's results are published. This ensures that multiple versions are not available simultaneously and avoids confusion among stakeholders. In-year revisions will only be made if new information is deemed substantial; a decision on whether to make a revision will be made on a case-by-case basis.
- Average salary refers to gross annual earnings for full-time employees and differs from the Private Sector Median (PSM) wage which is based on basic annual earnings.
- Invest NI has always measured support to business that are delivering products or services to aid decarbonisation. However, we introduced a new methodology to better track this type of support in April 2023; therefore, only two years of figures have been included in the Developing and Achieving Sustainability section.
- Further information on investments we have supported over the past five years can be found on the [Open Data NI Portal](#)⁷.

7. Open Data NI – Offer Activity Last 5 Years.



GLOSSARY

Access to finance – This is our suite of funds which provide businesses with much needed private and equity investment. The funds operate on a fully commercial basis and are managed by local, independent, FCA approved fund managers.

Assistance offered – the amount of support that Invest NI offered towards a project at its outset.

Assistance offered / total investment per head – the amount of assistance offered / total investment per head of population. Based on adult population from NISRA mid-year population estimates.

Belfast Metropolitan Area (BMA) – consists of Antrim & Newtownabbey, Ards & North Down, Belfast, Lisburn & Castlereagh council areas.

Company size – indicates whether a business is a small to medium sized enterprise (SME) with less than 250 employees or a large business with 250 or more employees.

Employment – refers to number of full-time equivalent jobs collected by the CPIs.

Entrants – businesses with an existing presence in NI but not supported during the previous CPI collection period.

Exports – sales to markets outside the UK.

External sales – sales to markets outside Northern Ireland. Including Great Britain.

Externally owned – a business which is 50 per cent or more owned by individuals or companies located outside Northern Ireland.

Inward investment – investment by an externally owned business (including Great Britain) in the Northern Ireland economy.

CPI portfolio – we collect CPIs from the majority of our supported businesses. There are a few conditions under which customers in receipt of our support are not selected, these are:

- start-up businesses (no information available)
- non-trading/ceased trading businesses
- parent (data collected under the subsidiaries) businesses
- businesses trading in NI 18 months or less (insufficient information).

Locally owned – a business which is over 50 per cent owned by individuals or companies located in Northern Ireland.

New jobs – the number of jobs that a business expects to create as a result of the project being fully implemented.

New starts – businesses that are either start-ups or new to NI which we are supporting.

Non-trading/ceased trading businesses – a business that no longer sells or buys goods or services, employs workers or operates on a day-to-day basis.

Offer (of support) / Investment – an agreement we made to offer grant support to a company at the start of a project. This agreement is based on the company's commitment to fully implement the project.

Parent businesses – a parent business is a business which owns one or more other businesses.

Private sector median wage – taken from the Annual Survey of Hours and Earnings (ASHE) and relates to the basic average (median) annual earnings for full time private sector workers in Northern Ireland. This is the benchmark against which we measure job quality performance.

Project contribution rate – the percentage of total investment that we offer towards a project.

Sales – turnover among businesses selected for the CPIs.

Sector – the sector categories were developed by us and are not directly comparable with other statistical industry or product classifications. They are designed to best represent the sectors we focus on.

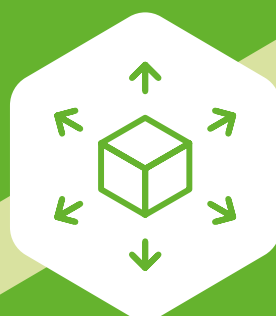
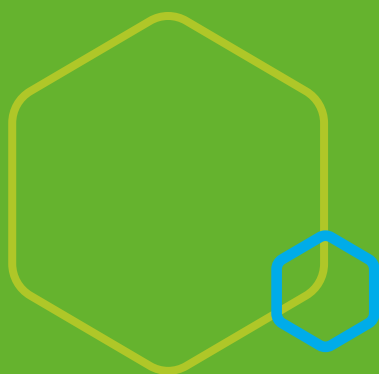
SMEs – small to medium sized enterprises with fewer than 250 employees and a turnover of less than £50m.

Total investment – the total expected cost of a project we are supporting. This represents the amount that a business plans to invest in the local economy and includes our assistance offered.

£ of investment per £ of assistance – the amount of total investment in the economy projected to be realised for every £1 of our assistance offered. This includes the £1 of assistance we offered in order to reflect the total investment in the local economy.

DISTRICT COUNCIL MAP





If you would like further information please contact:

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Invest NI

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Corporate Information

investni.com

