

# National Field Vegetable Census 2009



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### Notes:

The figures provided in this document are based on the best information available to Bord Bia and the Department of Agriculture, Fisheries & Food. For convenience, some figures have been rounded. Data analysis for this census was carried out by Franklin Research, Dun Laoghaire, Co. Dublin.

# National Field Vegetable Census 2009

## Introduction

The 2009 National Field Vegetable Census was compiled from a comprehensive survey of 212 field vegetable producers. The census was conducted in 2009, asking growers to provide details of field vegetable production in the previous year (**i.e. all figures are for 2008**). The purpose of this census was to quantify the field vegetable production in 2008 and illustrate what changes have taken place since similar censuses that provided figures for 2005, 2002 and 1999. The list of growers surveyed was drawn up from information available within the Department of Agriculture, Fisheries and Food (DAFF), Teagasc and Bord Bia.

The census was confined to growers producing at least two acres of field vegetables for the fresh vegetable market. Crops grown under protection (glasshouses, polythene tunnels, cloches) are excluded but those grown under floating mulches are included. Growers producing solely for the processed market are excluded, and potato production is also excluded. Employment figures are for those working directly with field vegetables, people working in prepared vegetable enterprises are excluded.

This census, with the earlier censuses, provides an important overview of the trends emerging in the Irish field vegetable sector. The 2009 census is an important milestone in the review of field vegetable production since it marks 10 years since the rollout of centralised distribution by leading retail multiples. The data for the census was collected by DAFF personnel and analysis was guided by Bord Bia and DAFF.

Bord Bia and DAFF wish to thank all field vegetable growers and Teagasc personnel involved for their co-operation in compiling this census.

# Executive Summary

The census highlights ongoing consolidation in terms of grower numbers and increased concentration of production in county Dublin.

The other main trends from this census are as follows:

- The total production area for field vegetables in 2008 is 4,590 hectares. This is an 8% increase since 2005.
- The farmgate value of field vegetable production in 2008 is €69.7 million. This is a 21% increase since 2005.
- There are 212 field vegetable growers in 2008 which is an 11% decline since the 2005 census. The rate of decline is lower than seen in previous censuses, however the trend of declining grower numbers remains. Included in the figure of 212 growers are 21 organic field vegetable growers (up from 12 growers in 2005).
- The field vegetable sector provides 911 full-time equivalent jobs in 2008. This is an 8% increase since the last census.

Large scale producers represent a significant, and growing, proportion of the total production area. The largest 50 growers (in terms of area) account for 74% of the total field vegetable production area in 2008, up from 70% in 2005.

Dublin is the most important county for field vegetable production. There are 2,157 hectares of field vegetables in Dublin county in 2008. This represents 47% of the national production area, and is up from 41% in 2005, reflecting further consolidation of production in Dublin. Dublin is also the only one of the main field vegetable producing counties to have increased production area since the last census.

## **Field Vegetable Crop Production**

Cabbage and carrots are the two most important field vegetables in terms of both production area and farmgate value. The production area of cabbage is 937 hectares in 2008 (an increase of 15% since 2005). The production area of carrots is 681

hectares in 2008 (a 5% decrease). The farmgate value of cabbage is €13.4 million in 2008, while that of carrots is €15.4 million.

Among the other main crops, the production area of broccoli increased 13% to 618 hectares in 2008. Production area for swedes and cauliflower are virtually unchanged from the last census, at 512 hectares and 434 hectares respectively. Scallions are now the fourth most important crop in terms of farmgate value. There are 108 hectares of scallions grown in 2008, with a farmgate value of €5.5 million.

### **Market Outlets**

Among the main crops, over four-fifths of output is sold through retailers (multiples, discounters and symbol groups) and wholesalers.

### **Business Issues**

Profitability issues are the primary business development issue for growers (i.e. achievable prices as against input costs).

### **Yield and Farmgate Value**

For the first time, the census includes data on average yield and farmgate value per unit for each crop (see Table 1 on page 38, and Table 2.2 in the appendix).

### **Organic Field Vegetable production**

Also for the first time, the census includes data on organic production. There are 21 organic field vegetable growers in 2008, with a production area of 147 hectares and a farmgate value of €3.1 million.

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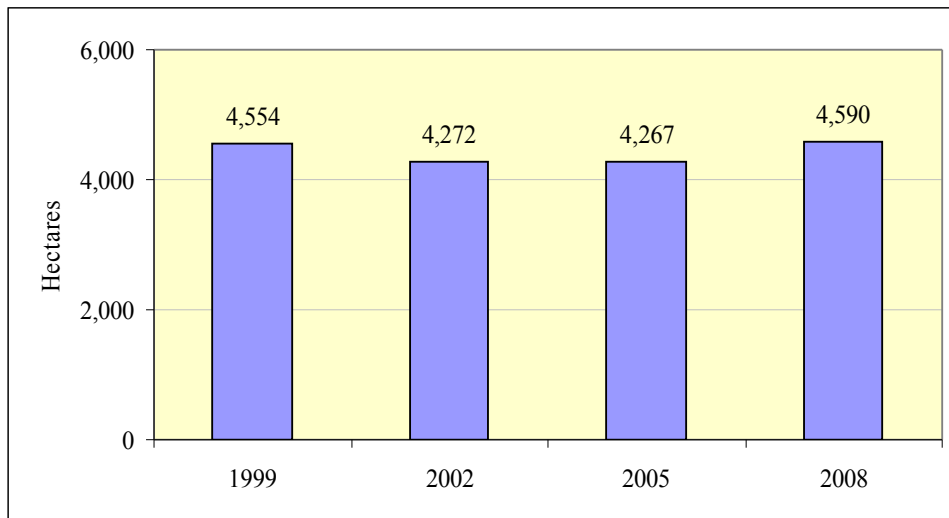
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## Section One: Production Area, Farmgate Value, Number of Growers & Employment Levels

This section provides an overview of field vegetable production in Ireland, including total production area, farmgate value, number of growers and employment levels.

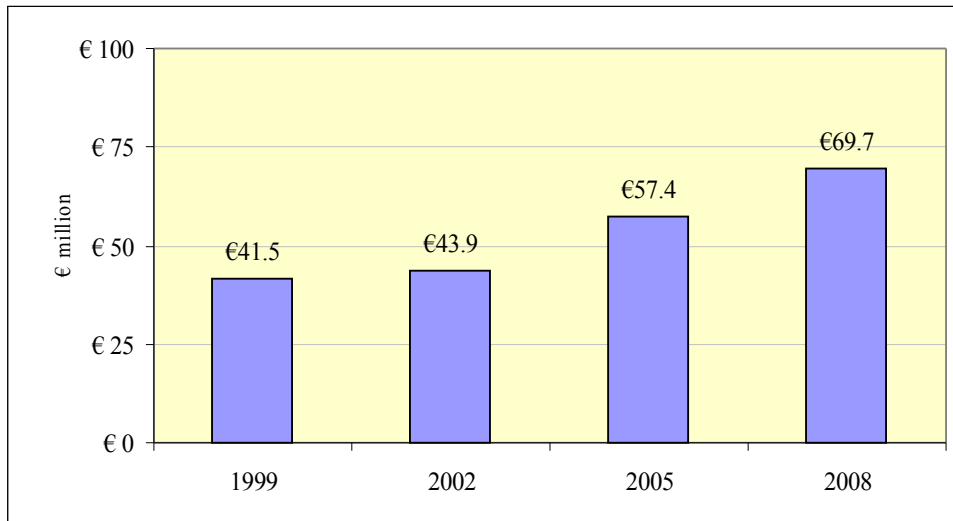
The main trend seen in this section is that total production area has remained relatively stable over the decade since 1999, despite a fall in grower numbers, highlighting consolidation in terms of grower size. The section also shows the increased concentration of production in Dublin.

Chart 1: Field Vegetable Production Area 1999-2008 (Hectares)



The total production area for field vegetables in 2008 is 4,590 hectares. This is an 8% increase since 2005 and shows that the trend of declining production area, seen in previous censuses, has been reversed. The area of field vegetables is at its highest recorded level since 1999.

Chart 2: Field Vegetable Farmgate Value 1999-2008 (€ million)

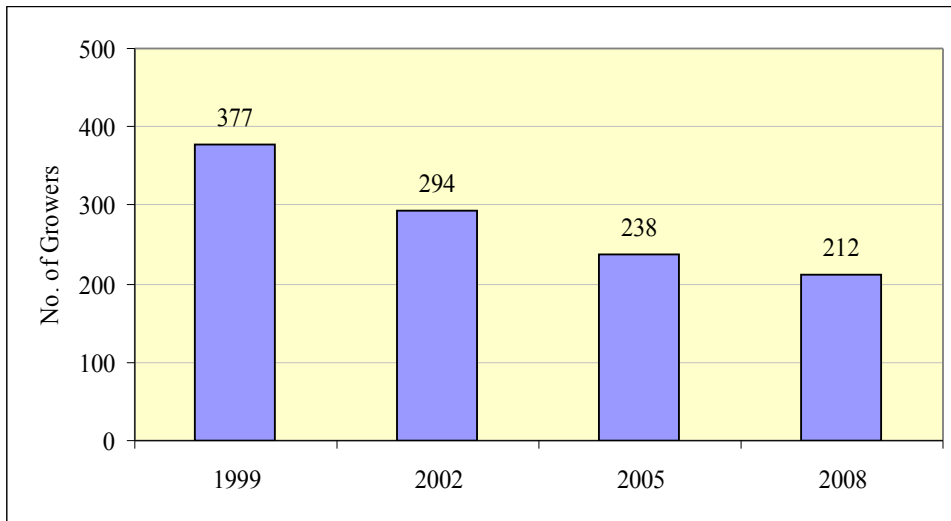


Over the 10 years since 1999, growers have shifted from a basic commodity product to now nearly all growers producing a shelf-ready product. The farmgate price reflects this value added element. The farmgate value of field vegetable production in 2008 is €69.7 million. This represents a 21% increase since 2005\*, and a 68% increase since 1999. Changes in farmgate values over time should be considered in light of changes in costs and inflation over time.

The farmgate values for each county are shown in Appendix Table 1.1.

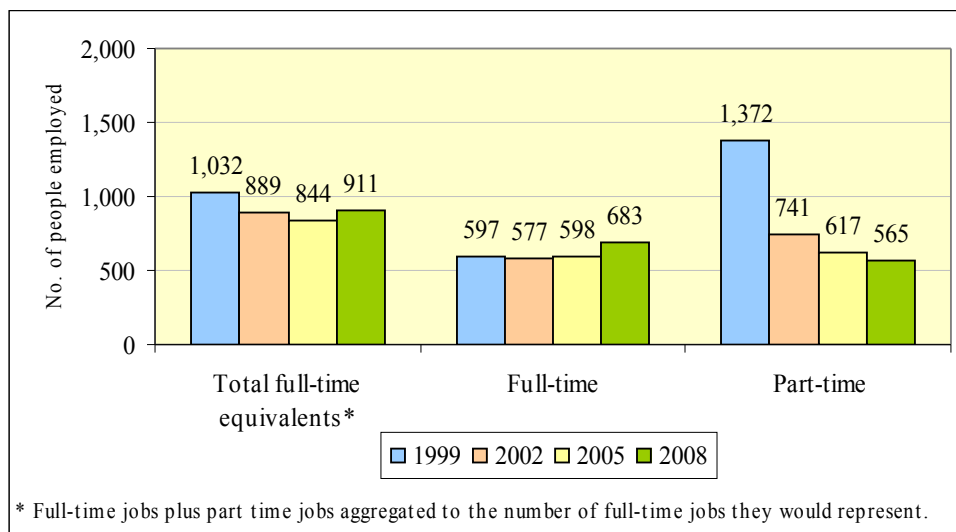
\* farmgate value figures for 2005 were based on a combination of grower information on area and yield, and DAFF estimates of value. Farmgate value figures for 2008, 2002 and 1999 are based on output value figures provided by growers. All farmgate values are a snapshot of the value at that point in time, so inflation and rising input costs over time are not factored in.

Chart 3: Number of Field Vegetable Growers 1999-2008



There are 212 field vegetable growers in 2008 which is an 11% decline since the 2005 census (238 growers in 2005). The rate of decline is lower than seen in previous censuses, however the trend of decreasing grower numbers remains. The numbers of field vegetable growers has declined 44% since 1999.

Chart 4: On-Farm Field Vegetable Sector Employment 1999-2008

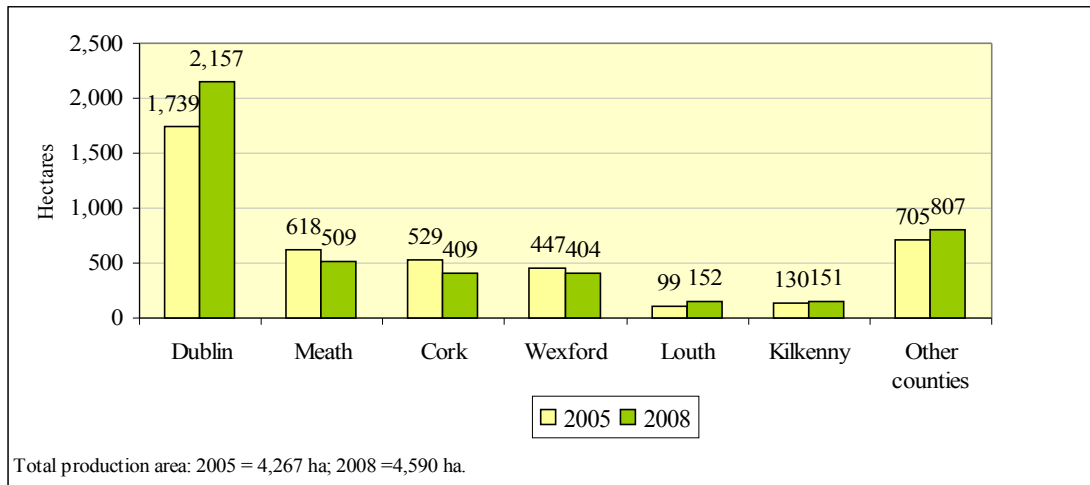


The field vegetable sector provides 911 full-time equivalent jobs in 2008. This is an 8% increase since the last census (844 full-time equivalent jobs in 2005).

The number of full-time jobs provided by the sector has increased by 14%, from 598 full-time jobs in 2005 to 683 in 2008. The sector provides 565 part-time jobs in 2008, down from 617 in 2005, and 1,372 in 1999. This reduction in levels of part-time staff may be explained by increased levels of mechanisation over the decade.

Appendix Table 1.2 shows employment data for each county.

Chart 5: Field Vegetable Production Area 2005-2008 by County (Hectares)

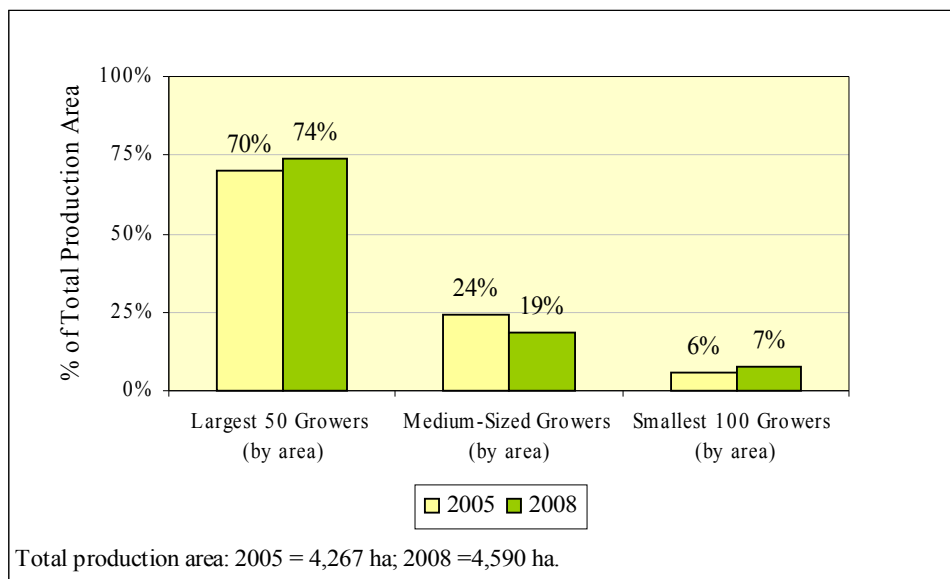


Dublin is the most important county for field vegetable production. There are 2,157 hectares of field vegetables in Dublin county in 2008, which is 47% of the national production area. Dublin is also the only one of the main field vegetable producing counties to have increased production area since the last census.

Field vegetable production is concentrated in Leinster. Cork is the only major field vegetable producing county outside of Leinster (accounting for 9% of the national area).

Appendix Table 1.1 shows production statistics by county.

Chart 6: Field Vegetable Production by Holding Size 2005-2008

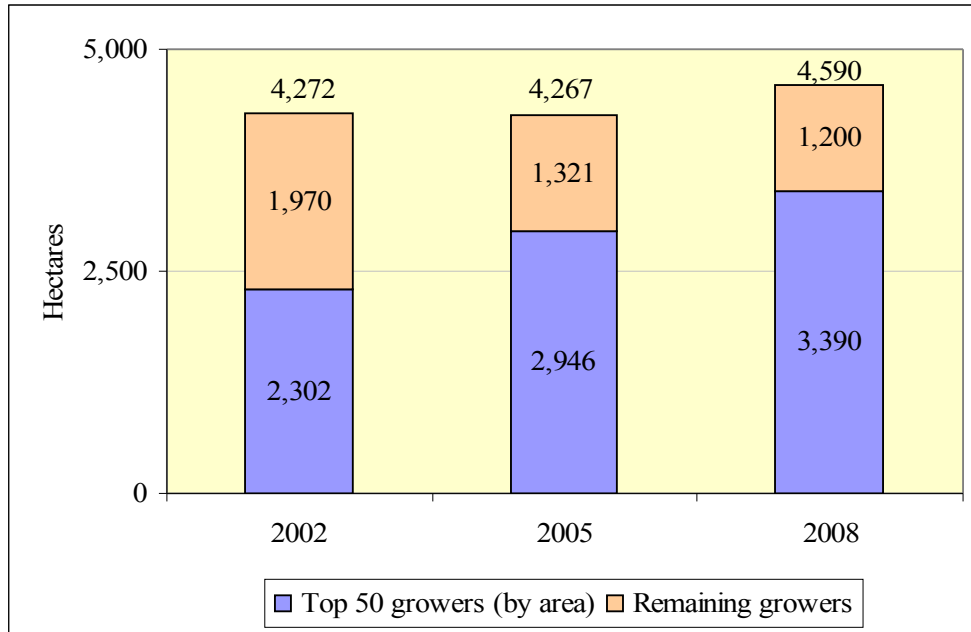


Large-scale producers have increased their dominance of the sector. The largest 50 growers (in terms of area) account for 74% of the total field vegetable production area in 2008, up from 70% in 2005.

The smallest 100 growers (in terms of area) account for only 7% of the total production area in 2008. Medium-sized growers (63 growers in 2008 with between approximately 8 and 25 hectares) account for the remaining 19% of the total field vegetable production area.

The remaining pages of this section look at the importance of the largest growers to overall production area, farmgate value and employment.

Chart 7: Contribution of Top 50 Growers to Total Field Vegetable Production Area  
2002-2008 (Hectares)



The top 50 growers in 2008 have a combined production area of 3,390 hectares, representing 74% of total production area.

The share of total production area accounted for by top 50 growers has increased over the last three censuses, from 54% in 2002, to 69% in 2005, to 74% in 2008. The fall in the production area among 'remaining growers' is partly due to a declining numbers of these growers (i.e. there were 244 'remaining growers' in 2002, 188 in 2005, and only 162 in 2008).

Chart 8: Contribution of Top 50 Growers to Total Field Vegetable Farmgate Value (€ million) 2005-2008

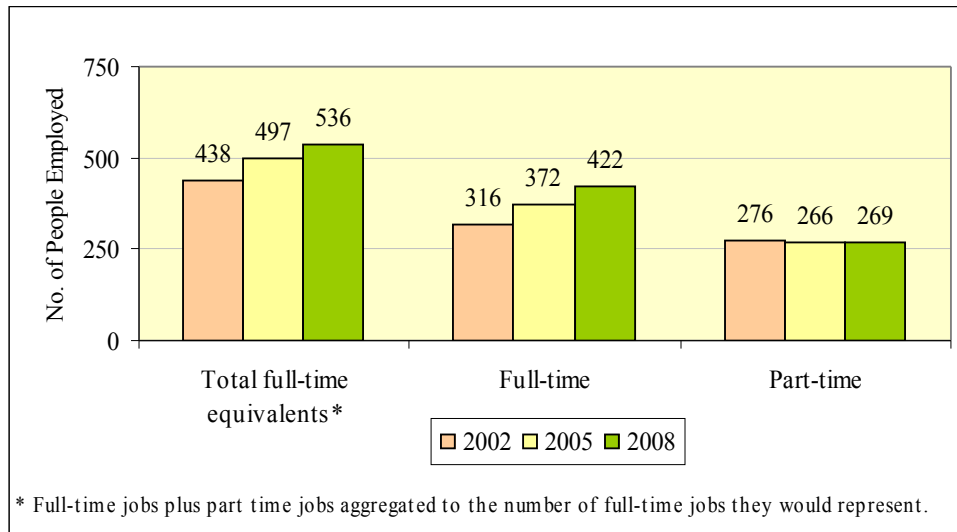


The farmgate value of the top 50 growers increased by 32% since 2005, from €40.5 million to €53.6 million in 2008.

The production value of the top 50 growers accounts for 77% of the total farmgate value of all growers (€69.7 million) in 2008. In 2005, the top 50 growers accounted for 71% of total production value.

Note: farmgate value figures for top 50 growers in 2002 are not available.

Chart 9: Top 50 Growers Employment 2002-2008



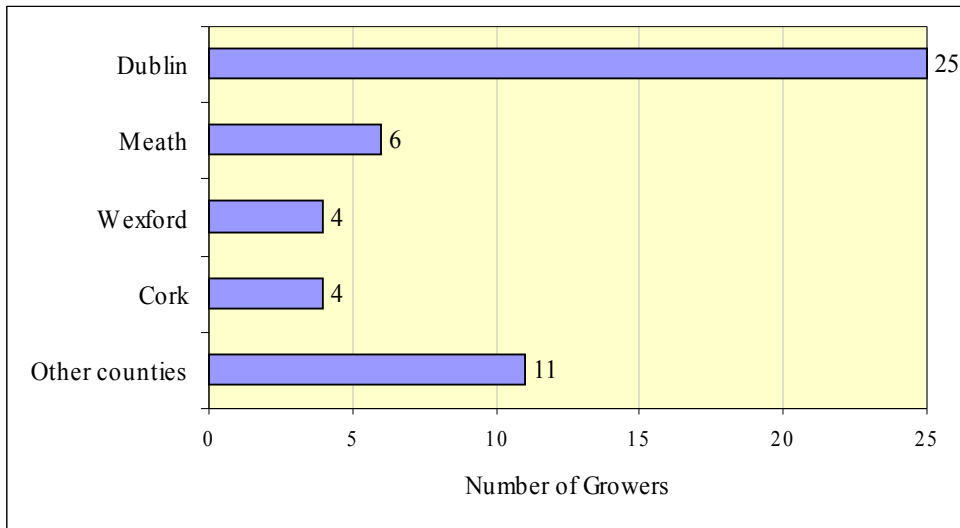
The top 50 growers provide 536 full-time equivalent jobs in 2008, which is 59% of the total of 911 full-time equivalents provided by the sector. It is also an 8% increase since the last census (497 full-time equivalent jobs in 2005).

Employment provided by the top 50 growers represents:

- 59% of full-time equivalent jobs provided by all growers
- 62% of full-time jobs provided by all growers
- 48% of part-time jobs provided by all growers

Given that the top 50 growers account for 74% of production area, the 59% of full-time employment they provide indicates a higher level of mechanisation and labour efficiency among larger growers.

Chart 10: Number of Top 50 Growers by County 2008



Of the top 50 growers in 2008, 25 are in Dublin, 6 are in Meath, 4 are in Wexford, 4 are in Cork, and the remaining 11 growers are in other counties.

## Section Two: Crops Grown

This section provides a breakdown of census information by type of crop grown. The charts show data for the most important crops grown in terms of production area.

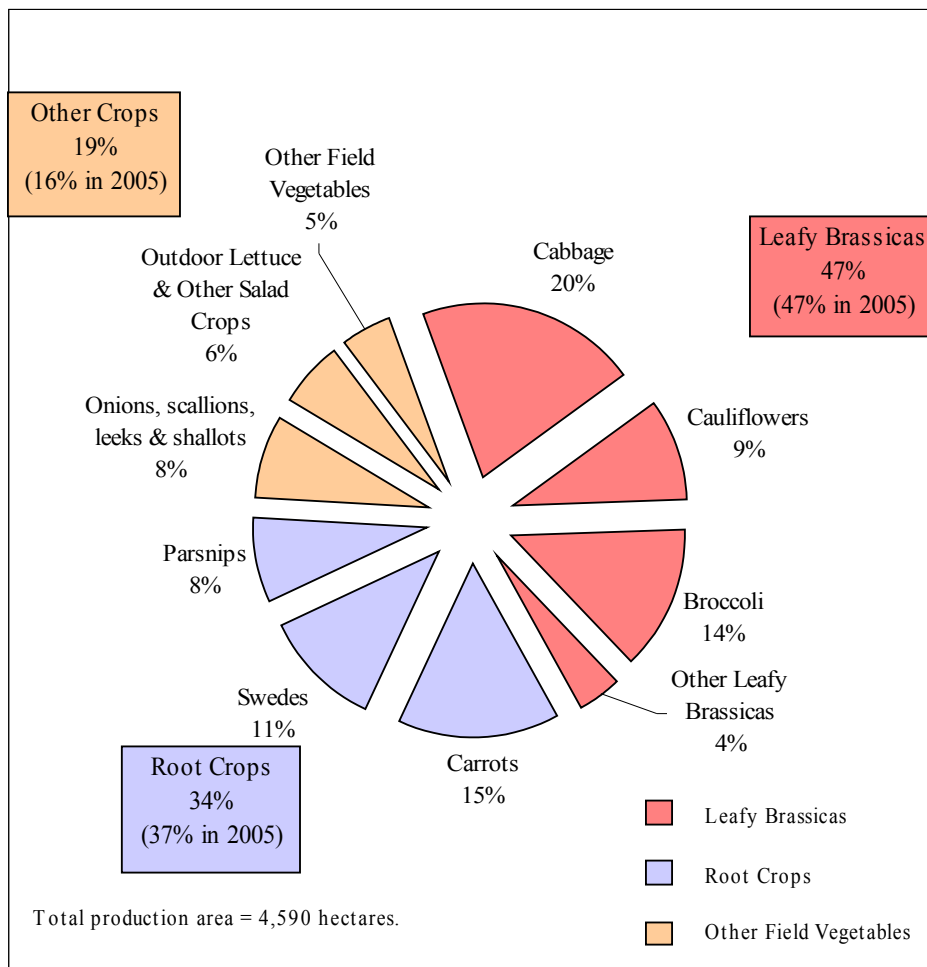
The main trends seen in this section are that cabbage production area increased by 15%, and broccoli by 13%. The production area of carrots fell slightly (5% decrease). There is very little change in the production areas of the other main field vegetable crops.

This section also shows that Dublin dominates production of many crops, the one exception being carrots for which Wexford is the most important county.

Finally, the section shows that most field vegetable output is sold through retailers (multiples, discounters and symbol groups) and wholesalers.

Note: Swedes are included in the root crop category even though, technically, they are a member of the Brassica family.

Chart 11: Field Vegetable Production Area 2008



Leafy brassicas account for almost half (47%) of all field vegetable production area in Ireland. Cabbage is the most important brassica (by area) representing 20% of total field vegetable production area.

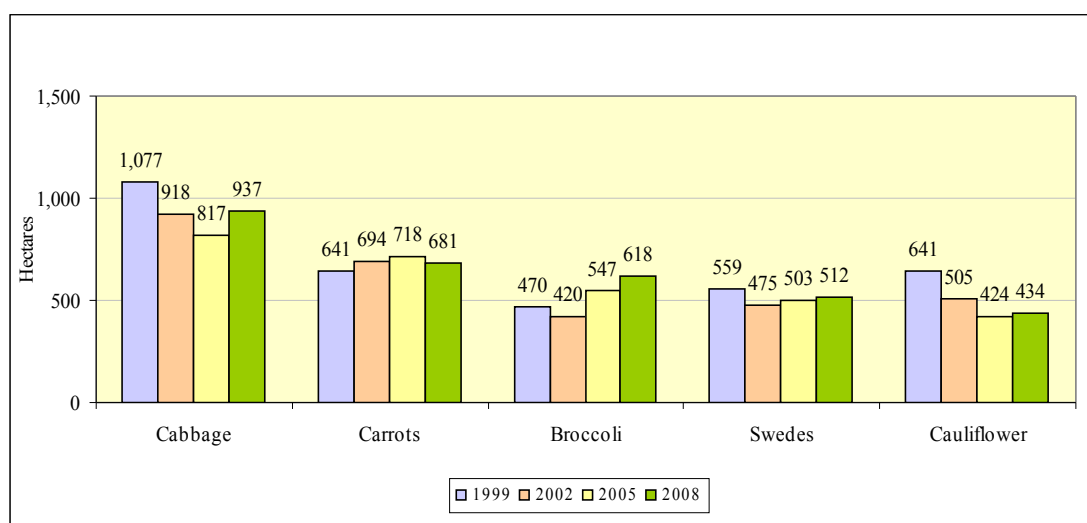
Root crops account for 34% of the total production area. Carrots are the most important root crop vegetable (by area) representing 15% of total production area.

The remaining 19% of production area is made up of onions and other alliums (8%), lettuce and other salad crops (6%) and other vegetables (5%).

Six crops (cabbage, carrots, broccoli, swedes, cauliflowers and parsnips) account for 77% of total production area. Appendix Table 2.1 shows a more detailed breakdown of production area, value and grower numbers for each crop type.

In comparison to the 2005 census, the proportion of production area accounted for by leafy brassicas is unchanged at 47%. Root crops are down slightly (from 37% in 2005 to 34% in 2008), while 'other crops' are slightly up (from 16% in 2005 to 19% in 2008). There are no major changes in the proportion of total production area accounted for by any individual crop.

Chart 12: Production Area of the 10 Most Important Field Vegetables (by area) 1999-2008 (Hectares)

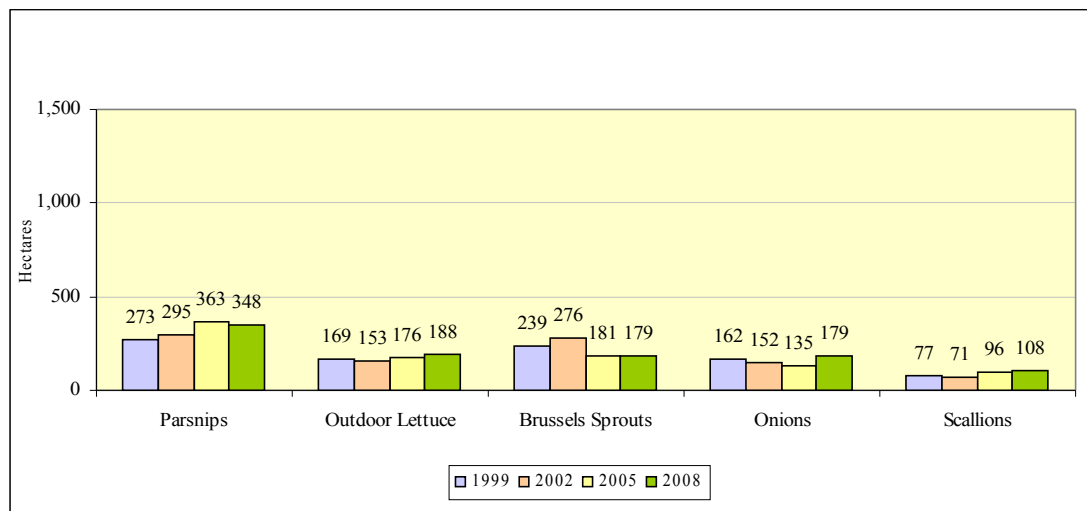


As seen in Chart 1, total production area of field vegetable crops increased 11% since the 2005 census. This increase is mostly accounted for by increases in the production areas of cabbage and broccoli:

- after many years of declining production, the production area of cabbage increased, from 817 hectares in 2005 to 937 hectares in 2008
- production area of carrots fell slightly (5%), from 718 hectares in 2005 to 681 hectares in 2008
- production area of broccoli increased 13%, from 547 hectares in 2005 to 618 hectares in 2008

The production area for swedes and cauliflower is almost unchanged from the 2005 census.

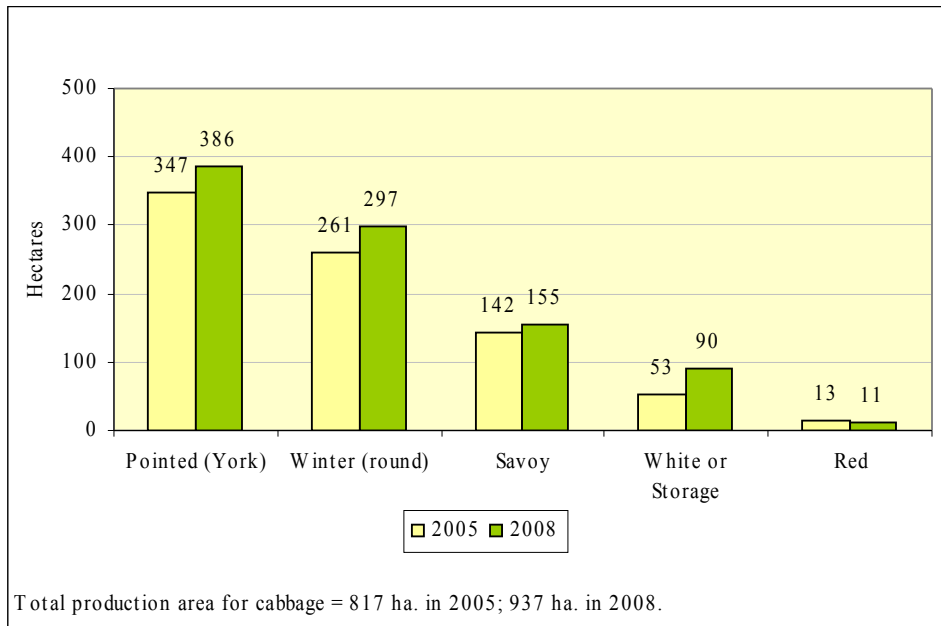
Chart 12 (Continued): Production Area of 10 Most Important Field Vegetables (by area) 1999-2008 (Hectares)



Production areas for parsnips, outdoor lettuce and brussels sprouts are very similar to those of 2005.

The production areas for onions and scallions show some small growth since 2005 (but from a low base).

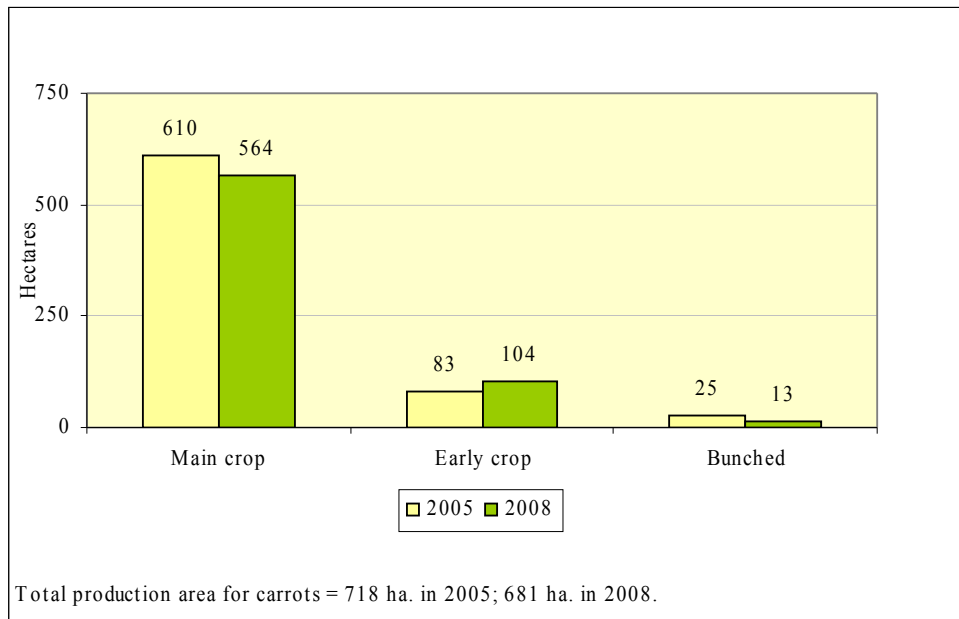
Chart 13: Production Area of Cabbage Crops 2005-2008 (Hectares)



Cabbage is the most important field vegetable in terms of area with 937 hectares grown in 2008. Production area has increased in all the main cabbage types:

- production area of pointed (York) cabbage increased 11% since 2005, from 347 hectares to 386 hectares in 2008
- production area of winter/round cabbage increased 14%, from 261 hectares in 2005 to 297 hectares in 2008
- production area of Savoy cabbage increased 9%, from 142 hectares in 2005 to 155 hectares in 2008

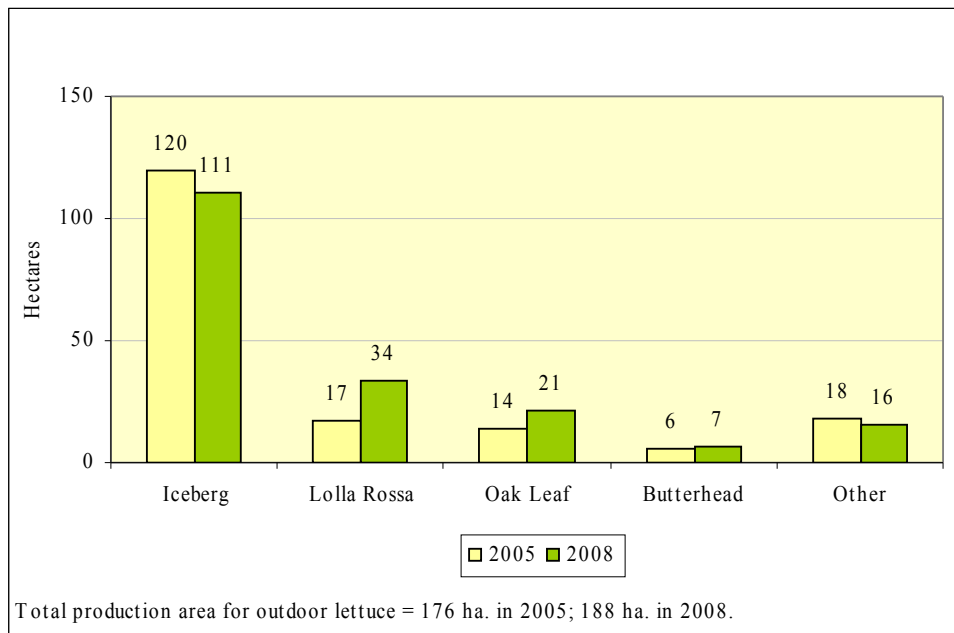
Chart 14: Production Area of Carrot Crops 2005-2008 (Hectares)



Carrots are the second most important field vegetable (by area) with 681 hectares grown in 2008. The production area of main-crop carrots has fallen slightly (8%) since 2005, from 610 hectares to 564 hectares in 2008. The production area of early crop carrots increased 25%, from 83 hectares in 2005 to 104 hectares in 2008.

Bunched carrots account for 2% of total carrot production area, with 13 hectares grown in 2008.

Chart 15: Production Area of Outdoor Lettuce Crops 2005-2008 (Hectares)



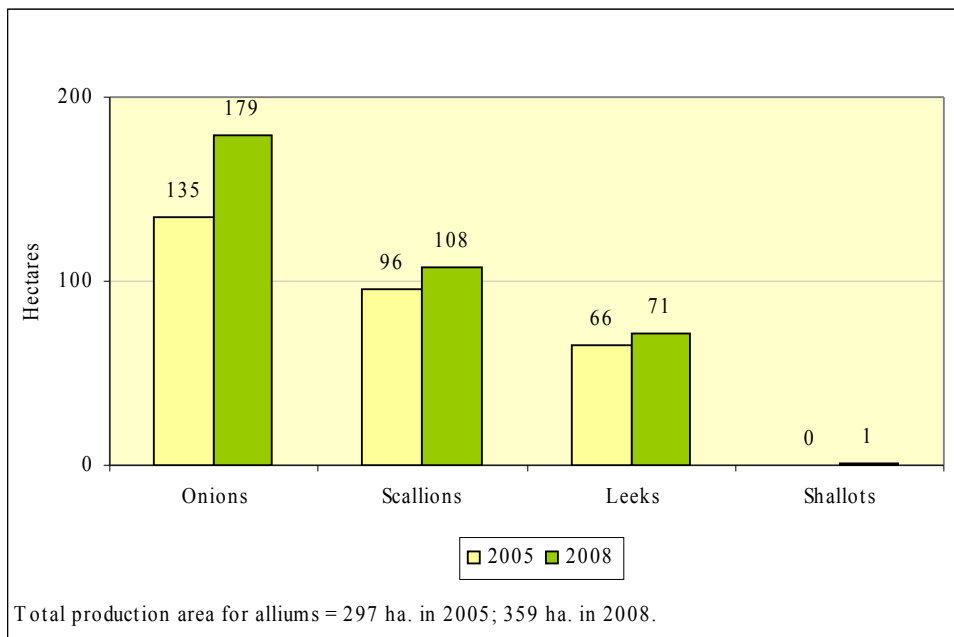
188 hectares of outdoor lettuce were grown in 2008. Iceberg lettuce is the most important outdoor lettuce type, accounting for 59% of total outdoor lettuce production area.

- production area of iceberg lettuce has decreased 7% since 2005, from 120 hectares to 111 hectares in 2008
- production area of Lolla Rossa lettuce has doubled since 2005, from 17 hectares to 34 hectares in 2008
- production area of Oak Leaf lettuce increased 50%, from 14 hectares to 21 hectares in 2008

The production area of butterhead lettuce is 7 hectares in 2008, and 16 hectares for other lettuce types.

The 2008 Outdoor Soft Fruit and Protected Crop Census showed that 113 hectares of lettuce were grown under protection. This was a small increase from the previous census (108 hectares in 2004).

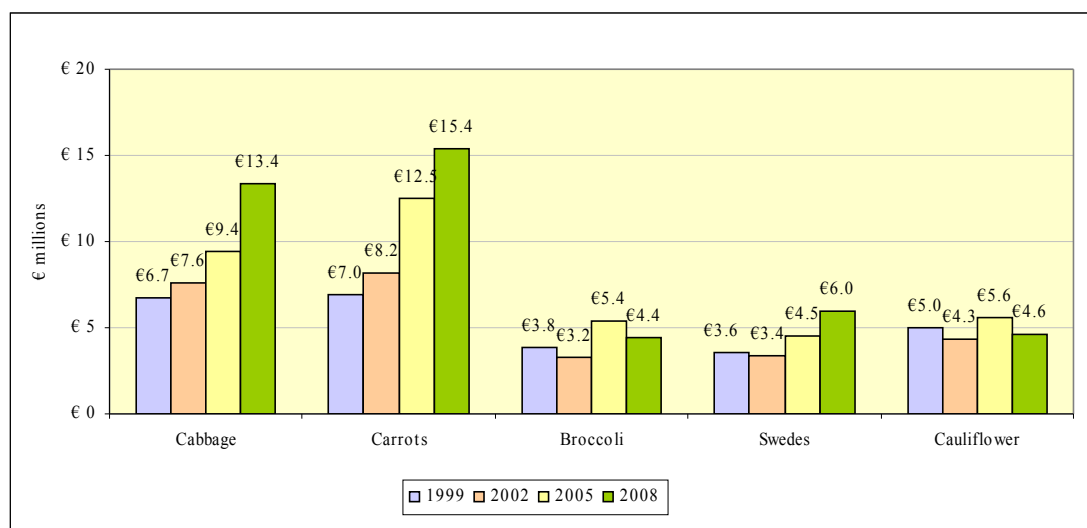
Chart 16: Production Area of Alliums 2005-2008 (Hectares)



359 hectares of alliums were grown in 2008. Onions are the most important alliums crop, accounting for 50% of total alliums production area.

- production area of onions increased significantly between 2005 and 2008, from 135 hectares to 179 hectares
- production area of scallions increased 13%, from 96 hectares in 2005 to 108 hectares in 2008
- production area of leeks increased 8%, from 66 hectares in 2005 to 71 hectares in 2008

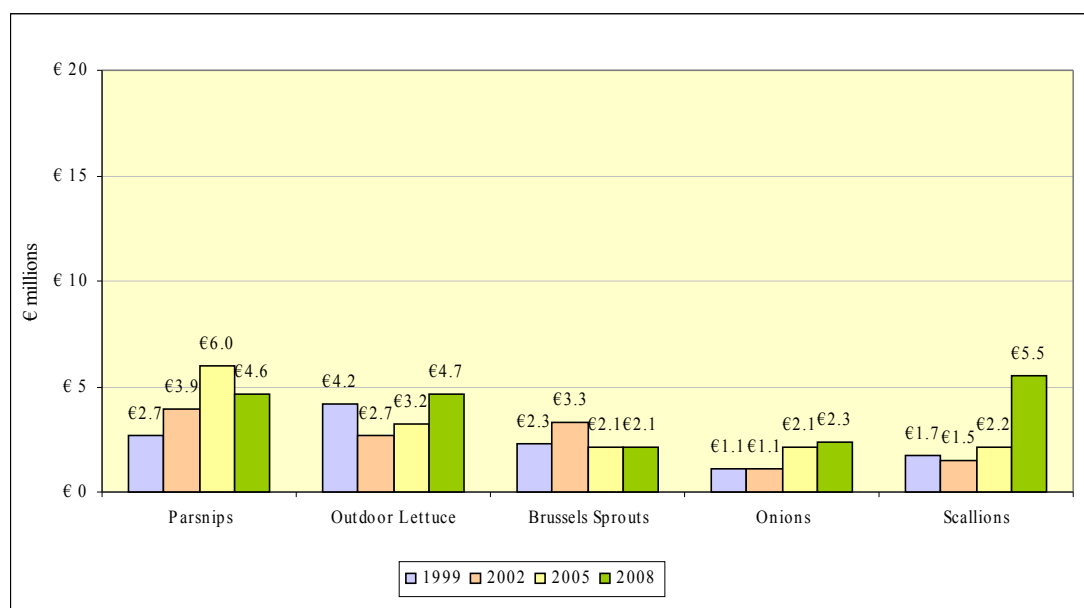
Chart 17: Farmgate Value of the 10 Most Important Field Vegetables (by area) 1999-2008 (€ million)



The total farmgate value of field vegetables is €69.7 million in 2008, and has increased by 21% since 2005 (see Chart 2). This increase in total production value is mostly accounted for by increases in the production values of cabbage (up 43%) and carrots (up 23%).

- the farmgate value of cabbage increased by 43%, from €9.4 million in 2005 to €13.4 million in 2008
- the farmgate value of carrots increased by 23% since 2005, from €12.5 million to €15.4 million in 2008. This can partly be explained by an increase in the production area of higher value early carrots.
- the farmgate value of broccoli fell by 19%, from €5.4 million in 2005 to €4.4 million in 2008. While the area of broccoli increased, the saleable yield and overall value fell due to poor weather conditions in 2008, reducing yield and giving rise to quality issues.
- the farmgate value of swedes increased by 33%, from €4.5 million in 2005 to €6.0 million in 2008
- the farmgate value of cauliflower fell by 18% since 2005, from €5.6 million to €4.6 million in 2008

Chart 17 (Continued): Farmgate Value of the 10 Most Important Field Vegetables (by area) 1999-2008 (€ million)

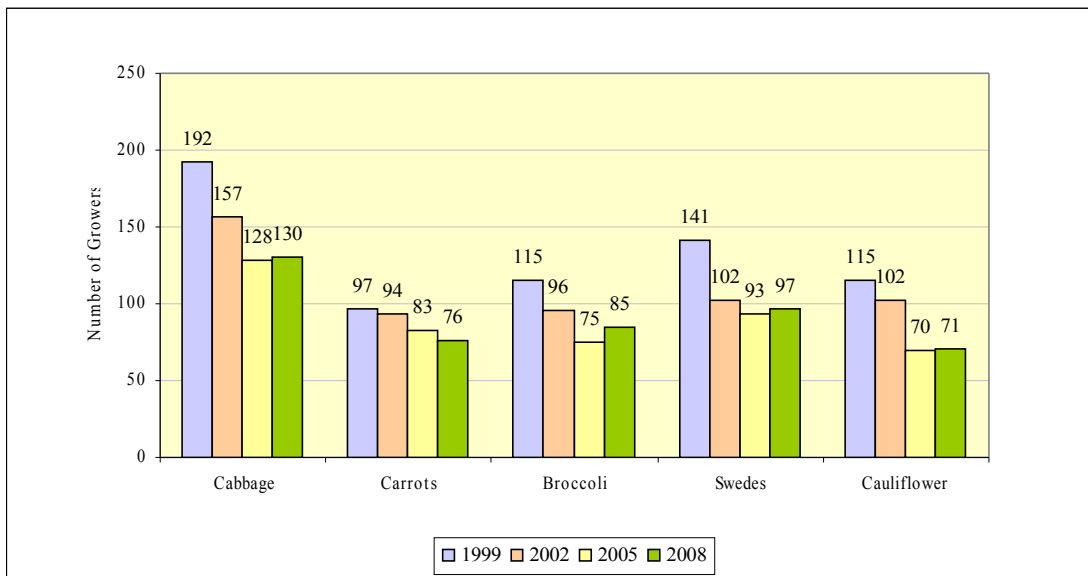


Among the other important (by production area) crops:

- the farmgate value of parsnips fell by 23%, from €6.0 million in 2005 to €4.6 million in 2008
- the farmgate value of outdoor lettuce increased by 47%, from €3.2 million in 2005 to €4.7 million in 2008. This is partly explained by increases in higher value lettuce types (e.g. Oak Leaf & Lolla Rossa)
- the farmgate value of scallions more than doubled, from €2.2 million in 2005 to €5.5 million in 2008

The farmgate value for each field vegetable grown in 2008 can be viewed in Appendix Table 2.1.

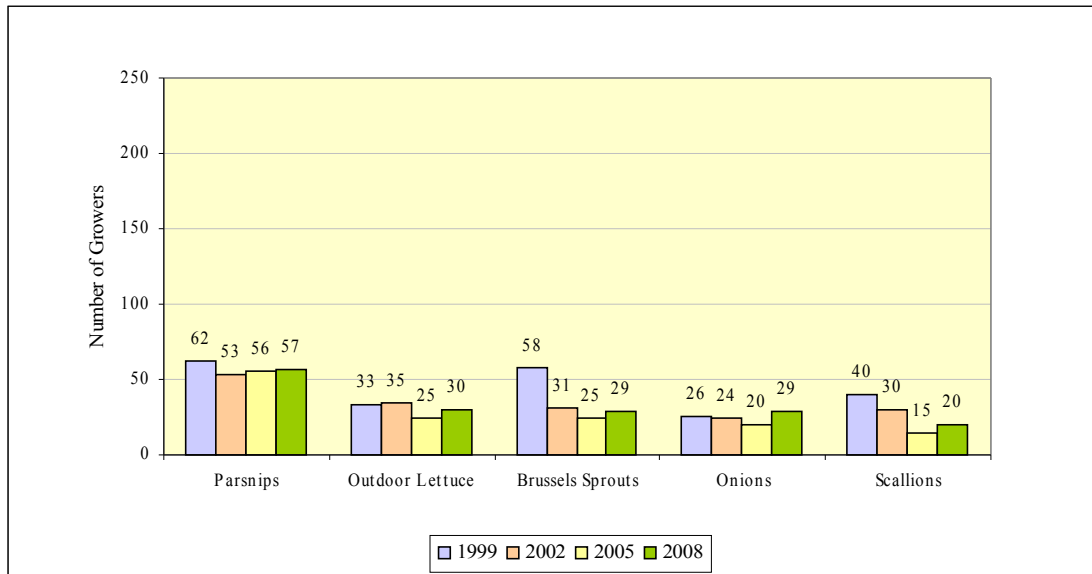
Chart 18: Number of Growers of the 10 Most Important Field Vegetables (by area)  
1999-2008



There are 212 field vegetable growers in 2008, a decrease of 11% since 2005 (see Chart 3). Within the 10 main crop types, the change in grower numbers is not as significant:

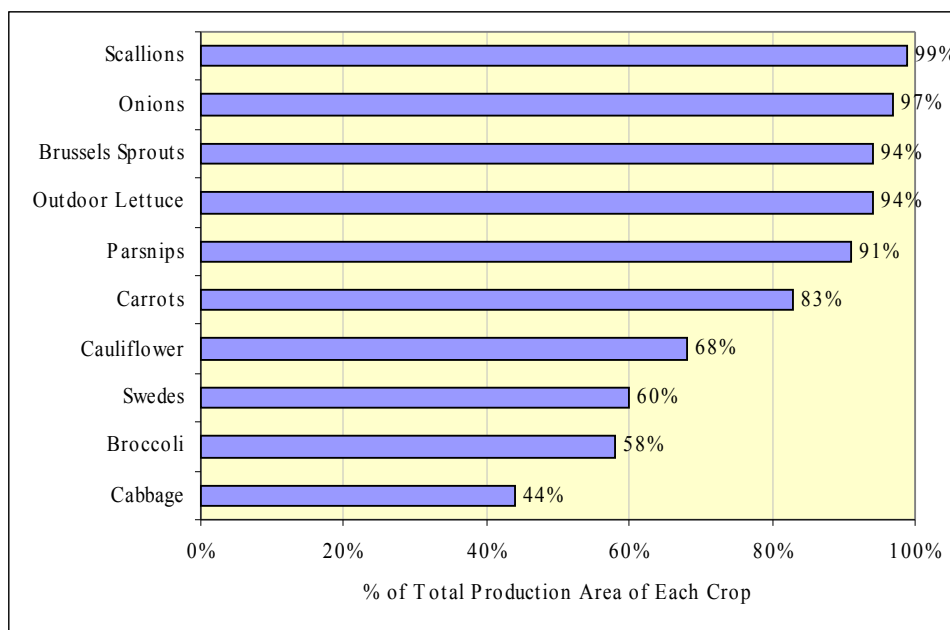
- the number of cabbage growers increased marginally from 128 growers in 2005 to 130 growers in 2008
- the number of carrot growers fell from 83 growers in 2005 to 76 in 2008, reflecting ongoing consolidation in the sector
- the number of broccoli growers increased from 75 growers in 2005 to 85 in 2008
- the number of swede and cauliflower growers increased marginally

Chart 18 (Continued): Number of Growers of Most Important Field Vegetables (by area) 1999-2008



There were small increases in the number of growers of the other main crops, especially onions and scallions.

Chart 19: Percentage of Total Area Produced by the Top 10 Growers of Each of the Most Important Crops 2008



Production of most of the main field vegetable crops is dominated by a small number of growers. This chart displays the percentage of total production area accounted for by the top 10 growers of that particular vegetable.

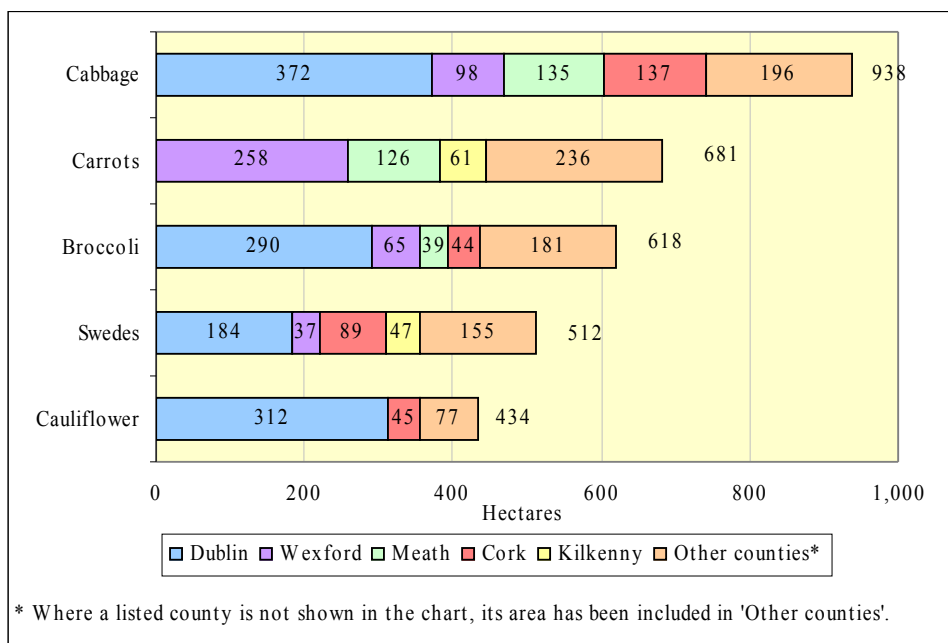
Of the most important crops produced, the top 10 growers account for 90% or more of the total production area of scallions, onions, brussels sprouts, outdoor lettuce and parsnips.

The top 10 carrot growers account for 83% of the production area of carrots.

Cabbage production (which has the largest production area and the highest number of growers) has many more smaller-scale growers, with the top 10 growers only accounting for 44% of production area.

The top 10 growers (in terms of area) across all field vegetables accounted for 29% of total production area.

Chart 20: Production Area of the 10 Most Important Field Vegetables (by area) 2008  
by County

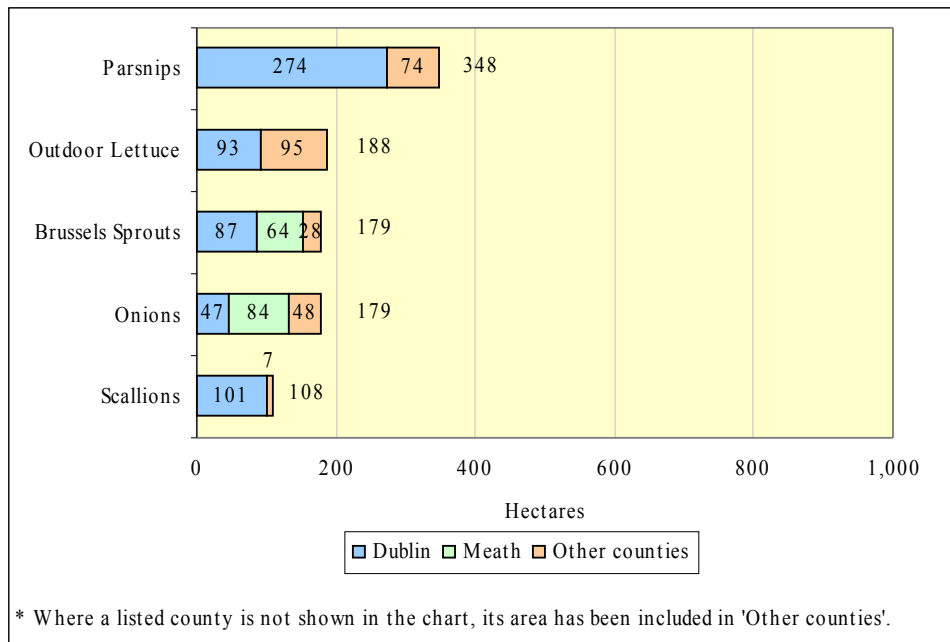


Dublin accounts for a high proportion of production area for many of the important crops. Dublin has 372 hectares of cabbage in 2008 (representing 39% of total production area of cabbage), 290 hectares of broccoli (47% of the total production area of broccoli), and 312 hectares of cauliflower (72% of the total production area of cauliflower).

Wexford is the most important county for carrots, with 258 hectares (38% of the total production area of carrots).

Among the other counties, Meath has 135 hectares of cabbage and 126 hectares of carrots. Cork has 137 hectares of cabbage and 89 hectares of swede.

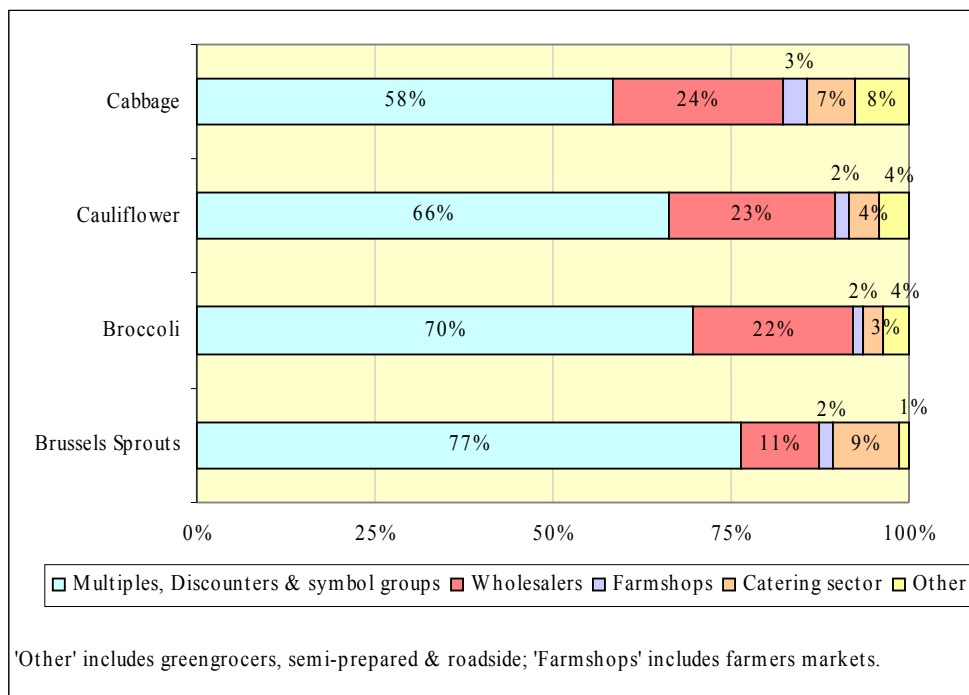
Chart 20 (Continued): Production Area of the 10 Most Important Field Vegetables (by area) 2008 by County



Among the other main crops:

- Dublin has 274 hectares of parsnips in 2008 ( representing 79% of the total production area of parsnips), 93 hectares of outdoor lettuce (49% of the total production area of outdoor lettuce), 87 hectares of brussels sprouts (49% of the total production area of brussels sprouts) and 101 hectares of scallions (94% of the total production area of scallions)
- Meath has 64 hectares of brussels sprouts (36% of the total production area of brussels sprouts) and 84 hectares of onions (46% of the total production area of onions)

Chart 21: Market Outlets for Brassica Crops 2008



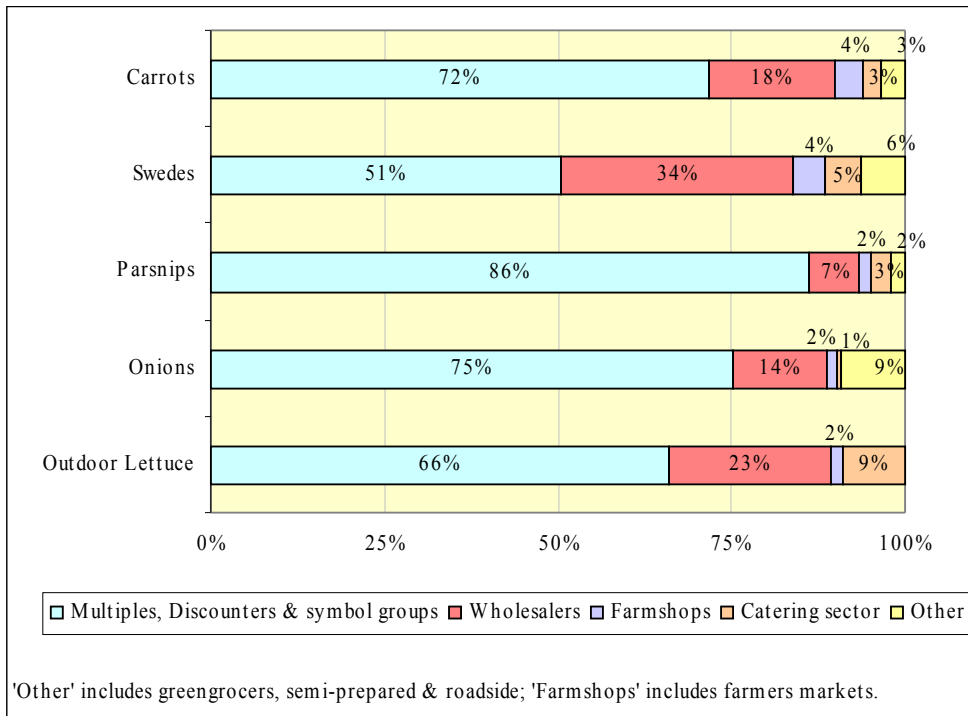
Each grower was asked to record the percent of sales through various market outlets for each type of vegetable grown. This information was combined with the grower's output (total yield) to determine the volume of output going through each channel.

The vast majority of brassica output goes through retailers (multiples, discounters and symbol groups) and wholesalers.

Though many small-scale growers (and particularly organic growers) may sell directly through farmshops/farmers markets, the channel accounts for only a small percent in terms of overall production volume.

The catering sector (i.e. restaurants, hotels and catering suppliers) directly utilises 9% of brussels sprouts output, 7% of cabbage output, and (see following page) 9% of outdoor lettuce output and 5% of swede output.

Chart 22: Market Outlets for Root Crops & Outdoor Lettuce 2008



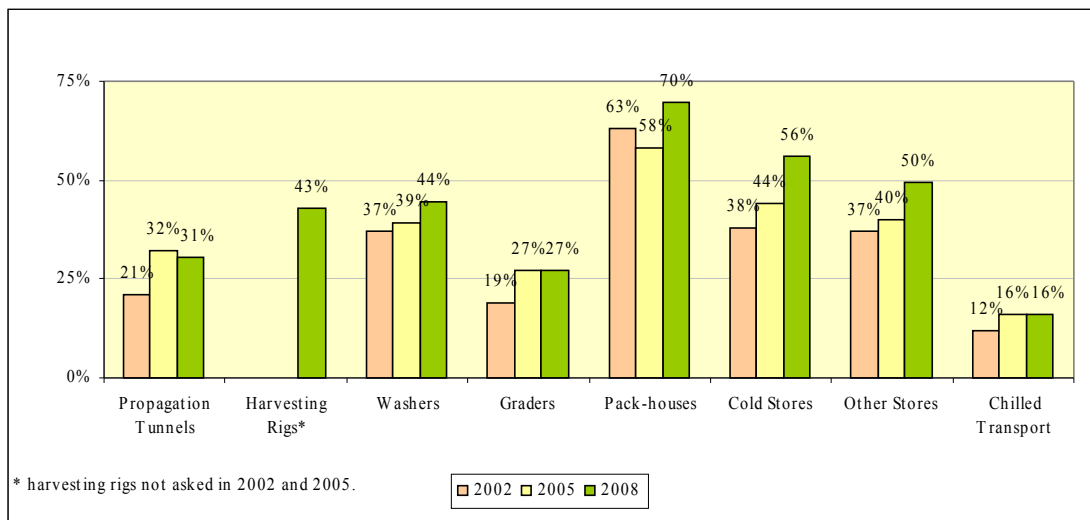
Among root crops and outdoor lettuce, most output is also sold through retailers (multiples, discounters and symbol groups) and wholesalers.

## Section Three: Farm Facilities & Business Development

This section provides a breakdown of various farm facilities such as propagation tunnels, pack-houses, storage and transportation. As many field vegetable growers are involved in other farming activities, only those farm facilities that are used for field vegetable production are listed in this analysis.

The section also covers grower comments regarding business development issues. These clearly show that profitability issues (achievable prices as against input costs) are the major concern for growers.

Chart 23: Percentage of Field Vegetable Growers with Various Facilities 2002-2008



Overall, the proportion of growers with various types of equipment and facilities has increased since 2002.

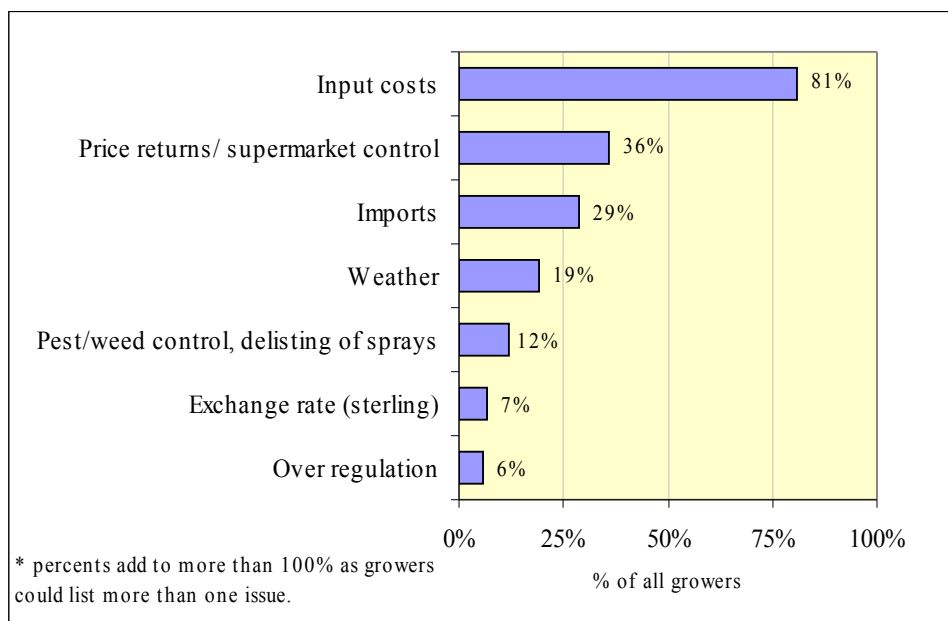
- 70% of growers have pack-houses (up from 63% in 2002)
- 56% of growers have refrigerated/cold storage (up from 38% in 2002)
- 44% of growers have washers (up from 37% in 2002)
- 27% have graders (up from 19% in 2002)
- 43% of growers have specialist harvesting rigs for at least one of the crops they grow (data not available for previous years)

All these increases reflect the growing trend towards investment in specialist equipment to meet market demands / achieve greater value added for vegetables. Many of these investments were supported by grant aid from DAFF (under the Scheme of Investment Aid for the Development of the Commercial Horticulture Sector).

Appendix Table 3.1 provides a breakdown of field vegetable facilities by county.

Appendix Table 3.2 provides a breakdown of propagation tunnels, pack-houses and storage facilities by area/volume.

Chart 24: Growers Declared Main Issues Affecting Competitiveness/ Cost of Production 2008



Profitability issues are by far the primary concern for growers. Growers cite high input costs (e.g. cost of labour, costs for fertilisers/pesticides/weed sprays, equipment/capital costs) and competition from imports as major problems given the market prices achievable. The bargaining power of supermarkets was mentioned by many growers.

Others issues include the effect of weather conditions on production, the delisting of certain plant protection products, difficulties with weed/pest control, the change in the exchange rate of the euro with sterling, and perceived over-regulation.

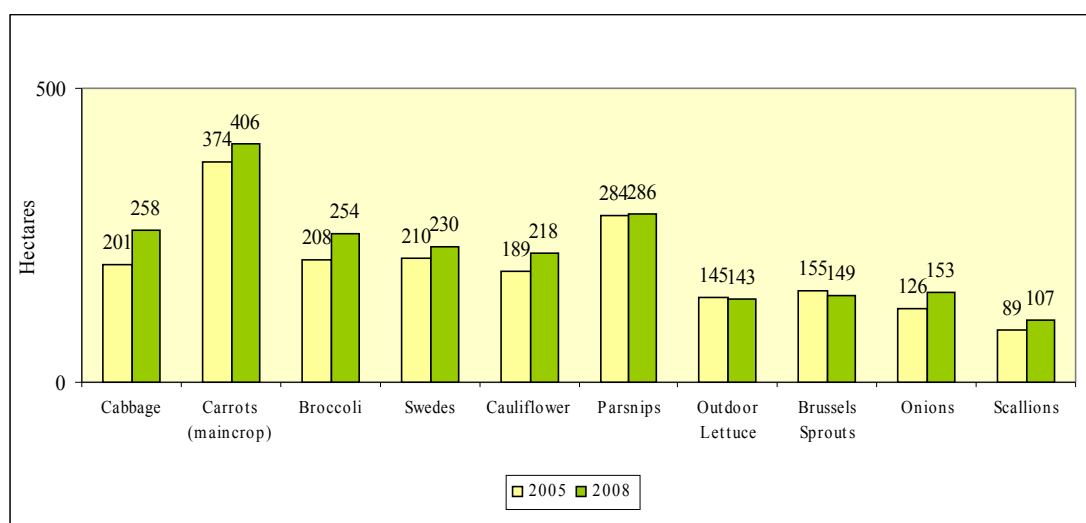
## Section Four: Analysis of the Top 5 Growers of Each of the Most Important Crops

As seen in the previous section, production of many of the main field vegetables is dominated by a small number of growers. This section looks at the top 5 growers of each of the ten most important crops by area. (Note: the top 5 growers for each crop can differ. For example, the top 5 growers of cabbage and the top 5 growers of carrots are not necessarily the same growers).

The section shows that the top 5 growers increased the production area of almost all the main crops between 2005 and 2008. The section also shows that the top 5 growers account for 75% or more of the total production area of parsnips, outdoor lettuce, brussels sprouts, onions and scallions.

Note: in this section, cabbage refers to all cabbage types (i.e. pointed, winter, Savoy, white/storage and red). However, Table 1 refers to pointed cabbage only.

Chart 25: Production Area of the Top-5 Growers of the Most Important Field Vegetables (by area) 2005-2008 (Hectares)



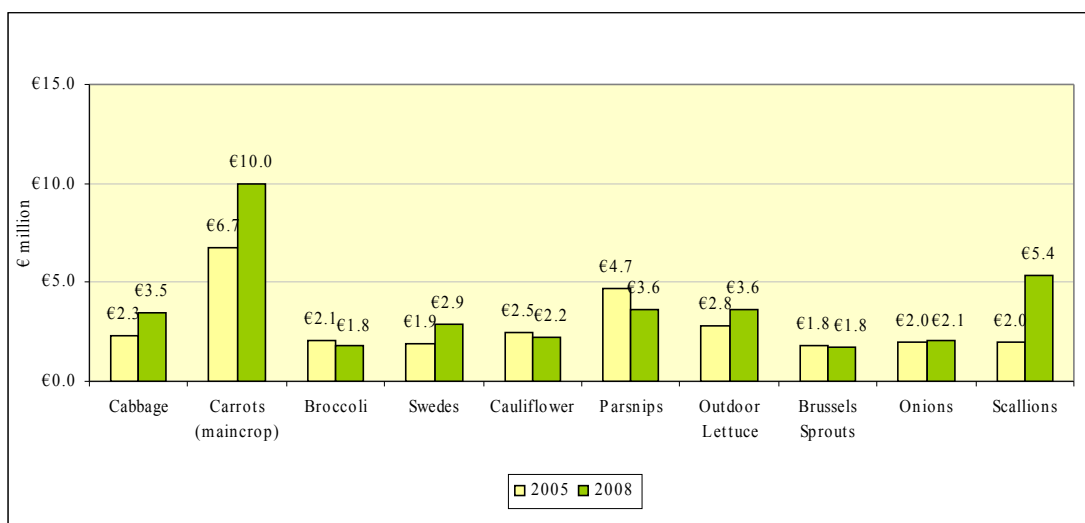
The above chart compares the production area of the top 5 growers of each crop in 2008 with that of the top 5 growers of each crop in 2005. The chart shows that the top 5 growers have increased the production area of almost all the main crops since 2005. The largest increases are seen for cabbage (up 28%), broccoli (up 22%), onions (up 21%) and scallions (up 20%).

Carrot production has consolidated among the larger growers. While total carrot production fell 5% between 2005 and 2008 (see chart 12), production by the top 5 growers increased by 9% (from 374 hectares in 2005 to 406 hectares in 2008).

The following summarises the percent changes in production area shown in the above chart.

Cabbage	28%
Carrots (maincrop)	9%
Broccoli	22%
Swedes	10%
Cauliflower	15%
Parsnips	1%
Outdoor Lettuce	-1%
Brussels Sprouts	-4%
Onions	21%
Scallions	20%

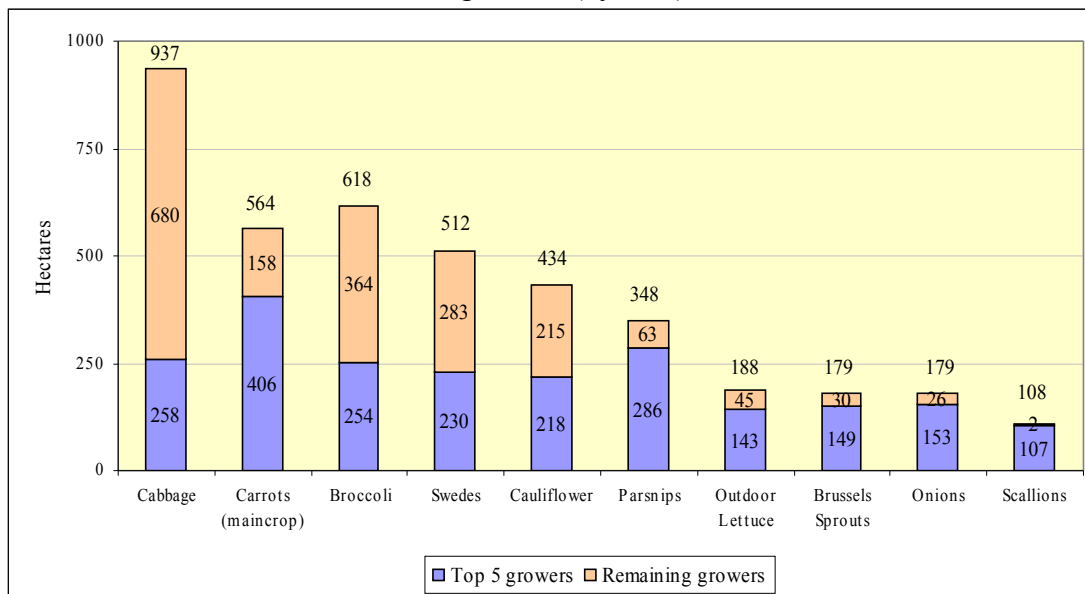
Chart 26: Farmgate Value of the Top-5 Growers of the Most Important Field Vegetables (by area) 2005-2008 (€ million)



Note: farmgate value figures for 2005 are based on DAFF estimates of prices per unit. 2008 value figures are based output value figures provided by growers.

Changes in farmgate value vary widely between crops. The farmgate value of carrots is up 49%, and that of scallions is up 170%. These increases are well above the respective increases in production area, indicating a higher level of value added by the growers.

Chart 27: Contribution of Top-5 Growers to Production Area of the Most Important Field Vegetables (by area) 2008

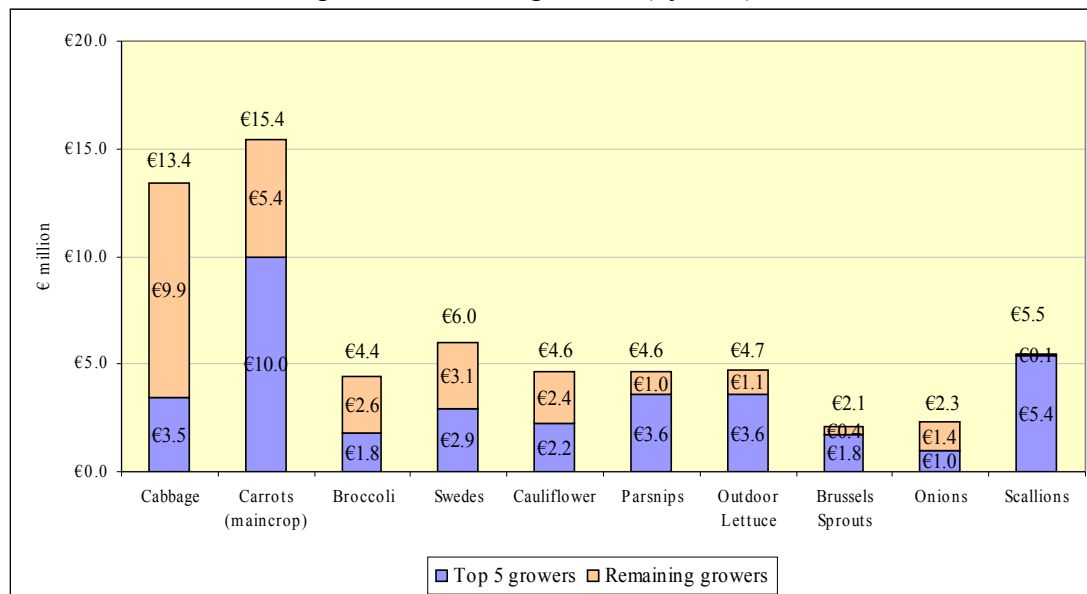


The top 5 growers account for a high proportion of the total production area of many of the important field vegetable crops:

- the top 5 growers of scallions account for 99% of total scallion area
- the top 5 growers of onions account for 85% of total onion area
- the top 5 growers of brussels sprouts account for 83% of brussels sprouts area
- the top 5 growers of parsnips account for 82% of parsnip area
- the top 5 growers of outdoor lettuce account for 76% of outdoor lettuce area
- the top 5 growers of main-crop carrots account for 72% of main-crop carrot area

Cabbage is less dominated by larger growers. The top 5 growers of cabbage account for only 28% of total cabbage area.

Chart 28: Contribution of Top-5 Growers to the Farmgate Value of the Most Important Field Vegetables (by area) 2008



The top 5 growers also account for a high proportion of farmgate value for many crops. The top 5 growers of scallions account for 98% of total scallion farmgate value. In contrast, the top 5 growers of cabbage account for only 26% of total cabbage farmgate value.

Table 1: Top-5 Grower Yield and Farmgate Value per Unit for Each of the 10 Most Important Crops (by area) 2008

	2008	
	Average Yield per Hectare <sup>(1)</sup>	Average Farmgate Value per Unit <sup>(2)</sup>
Cabbage - Pointed	37,066 heads per ha.	€0.46 per head
Cauliflowers	14, 694 heads per ha. <sup>(3)</sup>	€0.70 per head
Broccoli	6 tonnes per ha	€1,123 per tonne
Brussels Sprouts	13 tonnes per ha	€894 per tonne
Carrots (maincrop)	58 tonnes per ha	€427 per tonne
Swedes	32 tonnes per ha	€396 per tonne
Parsnips	13 tonnes per ha	€991 per tonne
Lettuce - Iceberg	52,124 per ha	€0.48 per head
Onions	41 tonnes per ha	€328 per tonne
Scallions	149,298 bunches of 6 per ha	€0.34 per bunch of 6

(1) Average yield per hectare calculated by dividing total yield by total hectares.

(2) Average farmgate value per unit calculated by dividing total value by total yield.

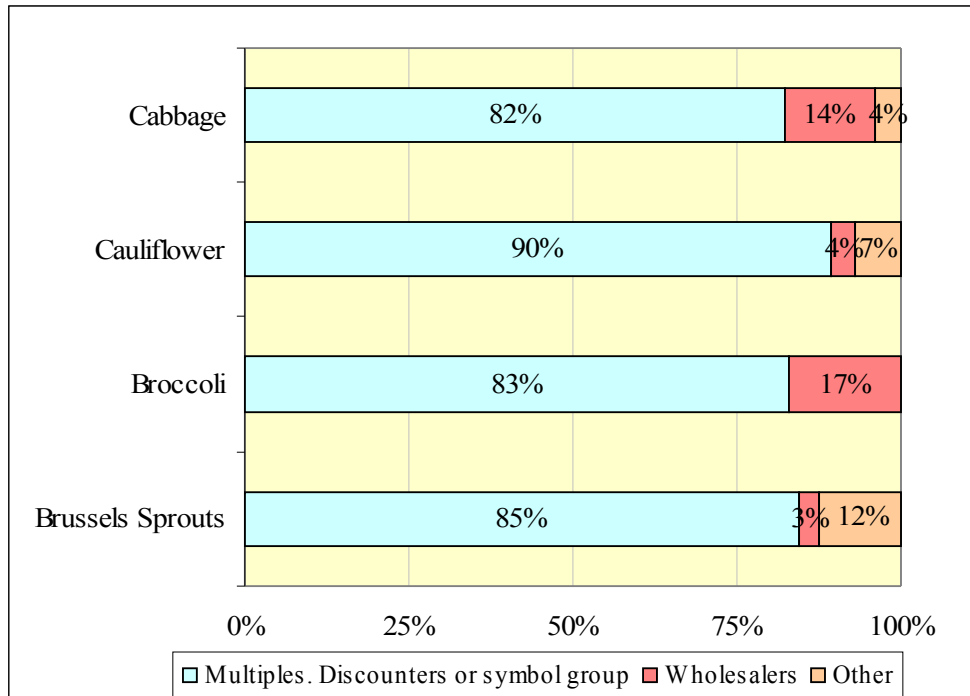
(3) 17,500 tonnes/ha is a more representative average - one of the top 5 growers had a low yield which is dragging down the average.

The above table shows the average yield per hectare and the average farmgate value per unit achieved by the top 5 growers of each of the 10 most important crops.

With regard to the above figures, it is important to note that weather conditions in 2008 were poor and impacted on yield and quality for many crops. Also, price per unit can vary significantly depending on the market/channel supplied and the value added at farm level.

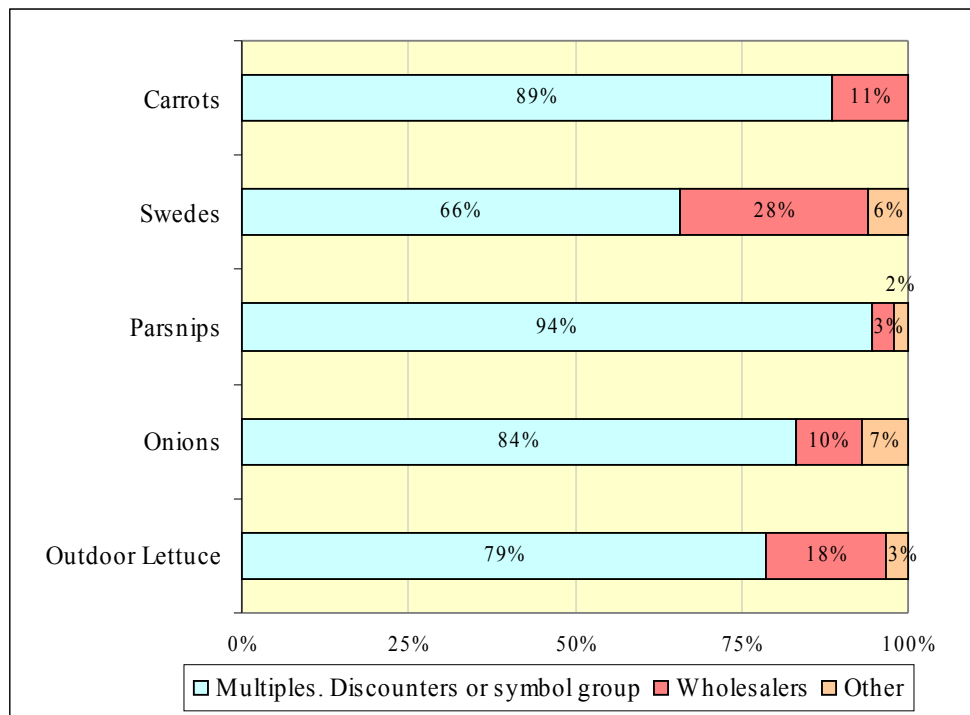
A full listing of yield and farmgate value for all crops and all growers is shown in appendix table 2.2.

Chart 29: Market Outlets for Top-5 Growers of Brassica Crops 2008



The top 5 growers for each type of brassica sell their output primarily through multiples, discounters and symbol groups.

Chart 30: Market Outlets for Top-5 Growers of Main Root Crops and Outdoor Lettuce 2008



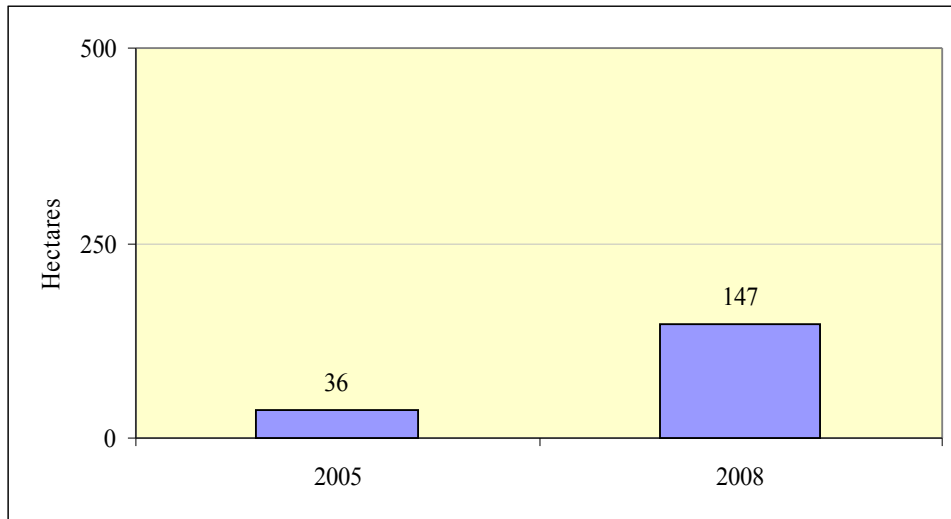
The top 5 growers of the main root crops and outdoor lettuce also sell their output primarily through multiples, discounters and symbol groups.

## Section Five: Analysis of Organic Field Vegetable Production

This section provides information on certified organic field vegetable production. The main finding is that organic production increased between 2005 and 2008, both in terms of production area and grower numbers. However, a relatively small number of larger organic growers account for most of the production area.

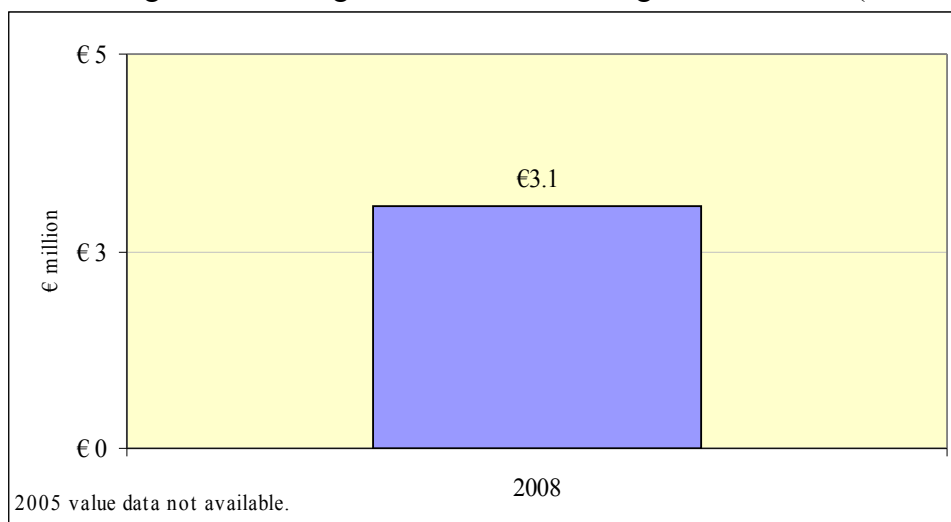
Note: previous sections included organic production. For example, figures for production area shown in previous section are combined totals for organic and non-organic growers.

Chart 31: Organic Field Vegetable Production Area 2005-2008 (Hectares)



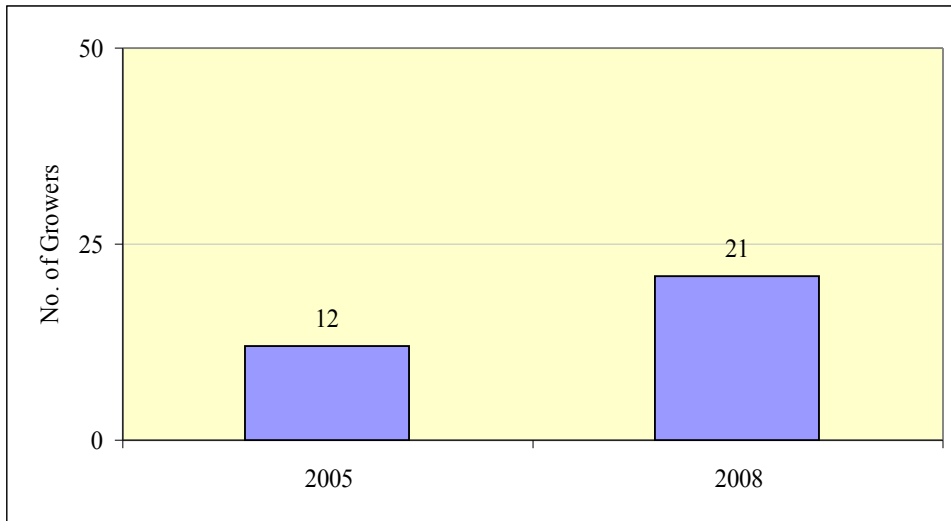
Organic field vegetable production area increased over three-fold since the last census, from 36 hectares in 2005 to 147 hectares in 2008.

Chart 32: Organic Field Vegetable Estimated Farmgate Value 2008 (€ million)



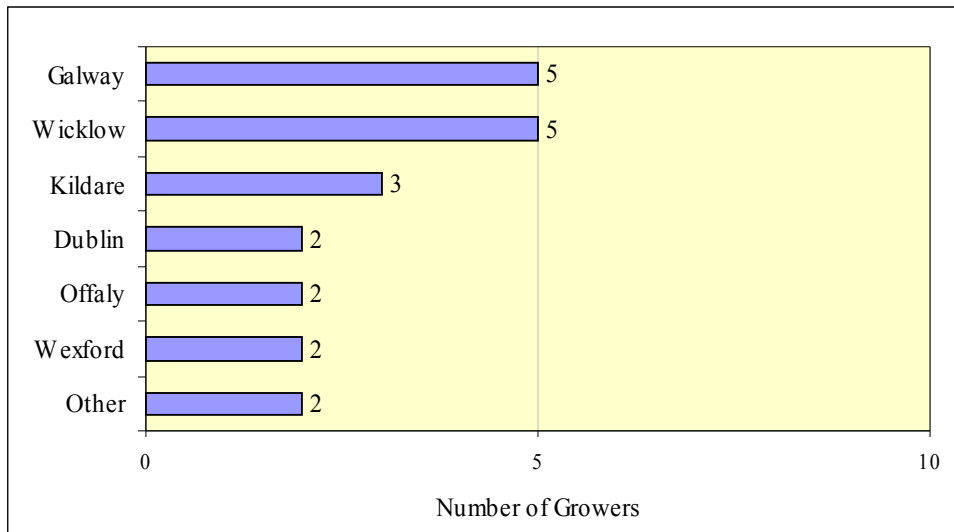
The farmgate value of organic field vegetable production is €3.1 million in 2008. Farmgate value for previous censuses is not available.

Chart 33: Number of Organic Field Vegetable Growers 2005-2008



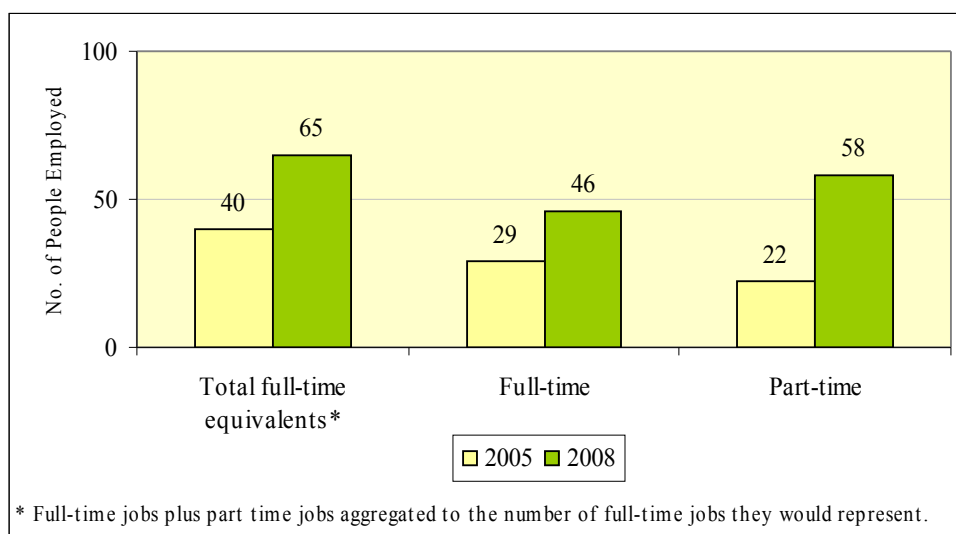
There are 21 organic field vegetable growers in 2008, up from 12 growers in 2005.

Chart 34: Number of Organic Field Vegetable Growers by County 2008



The main counties for organic field vegetable production in terms of grower numbers are Galway and Wicklow (5 growers each).

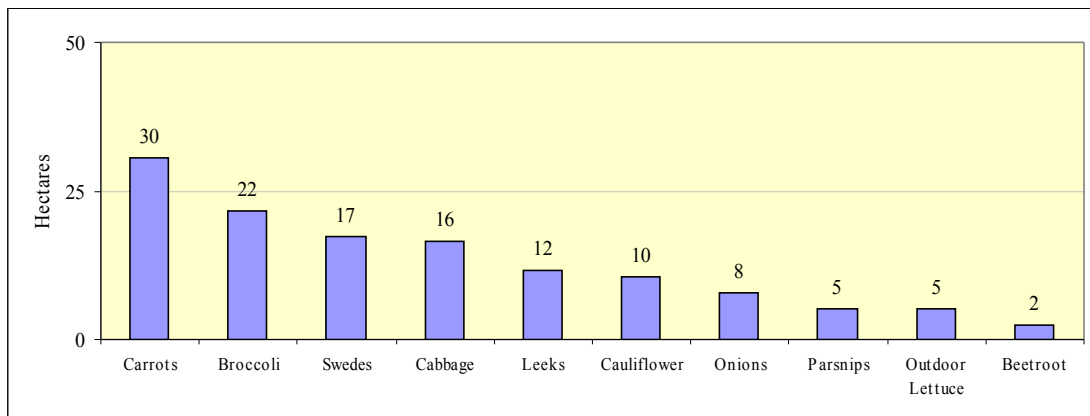
Chart 35: On-Farm Organic Field Vegetable Sector Employment 2005-2008



Organic field vegetable growers provide 65 full-time equivalent jobs in 2008, up from 40 in 2005.

The 65 full-time equivalent jobs provided by organic growers represents 7% of the total full-time equivalent jobs provided by the field vegetable sector overall. However, organic growers account for only 3% of total production area and 4% of total farmgate value. This indicates that organic production is more labour intensive.

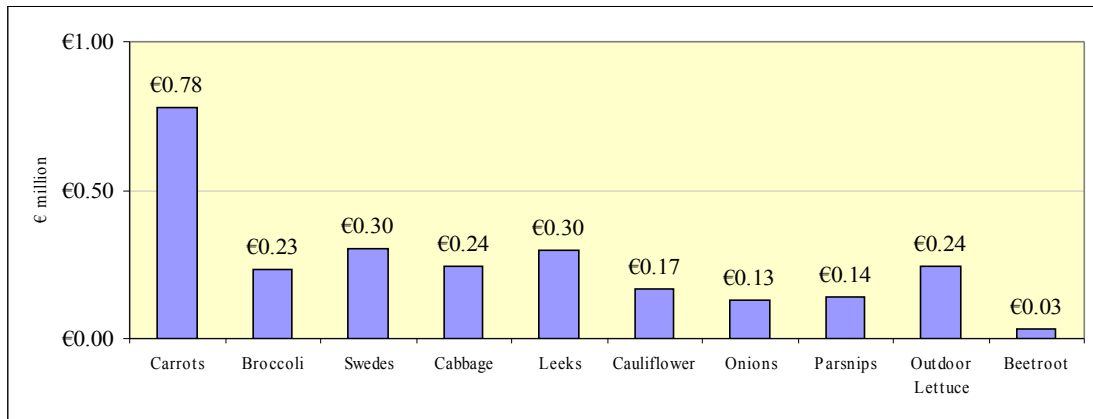
Chart 36: Production Area of the 10 Most Important Organic Field Vegetables (by area) 2008 (Hectares)



The chart shows the total certified organic production area for the ten most important organic field vegetable crops by area.

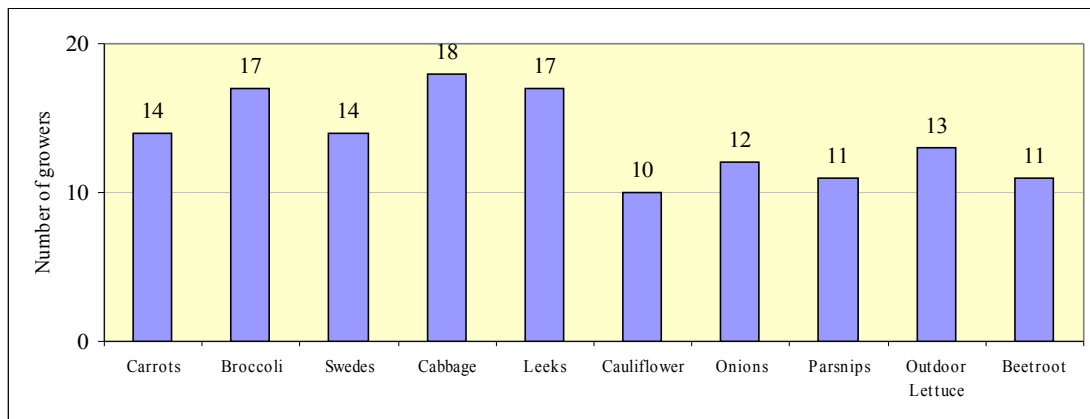
Carrots are the most important organic field vegetable crop in terms of production area (30 hectares of organic carrots in 2008).

Chart 37: Estimated Farmgate Value of the 10 Most Important Organic Field Vegetables (by area) 2008 (€ million)



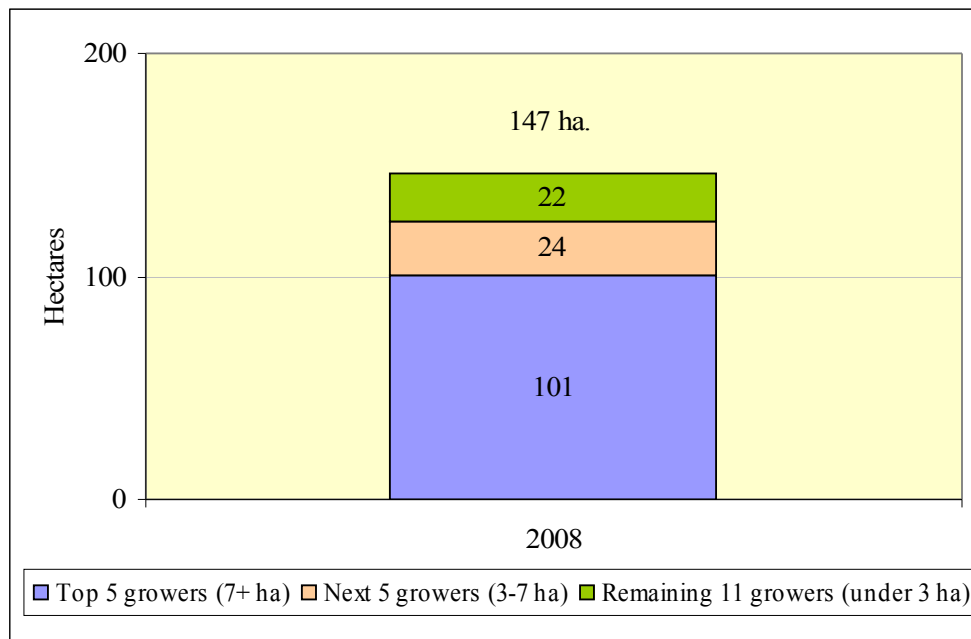
Carrots are by far the most important organic field vegetable crop in terms of farmgate value (€0.78 million).

Chart 38: Number of Growers of the 10 Most Important Organic Field Vegetables (by area) 2008



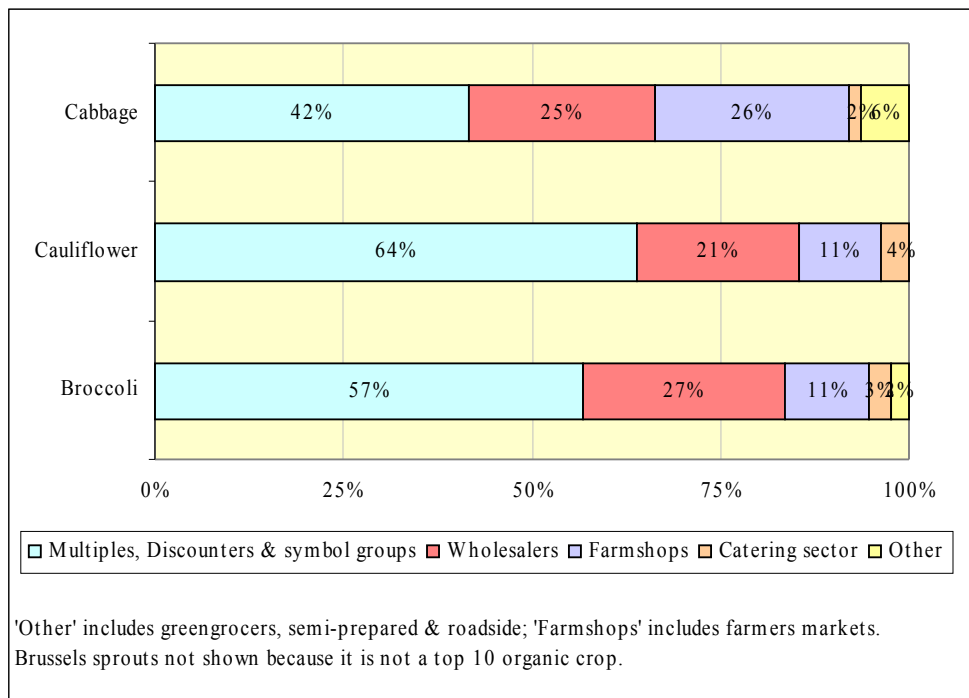
The most commonly grown organic field vegetable is cabbage, grown by 18 of the 21 organic growers. The chart suggests that most organic growers grow a range of organic vegetables, and don't specialise in certain field vegetable crops to the same extent as conventional growers.

Chart 39: Contribution of Largest Organic Growers (by area) 2008 (Hectares)



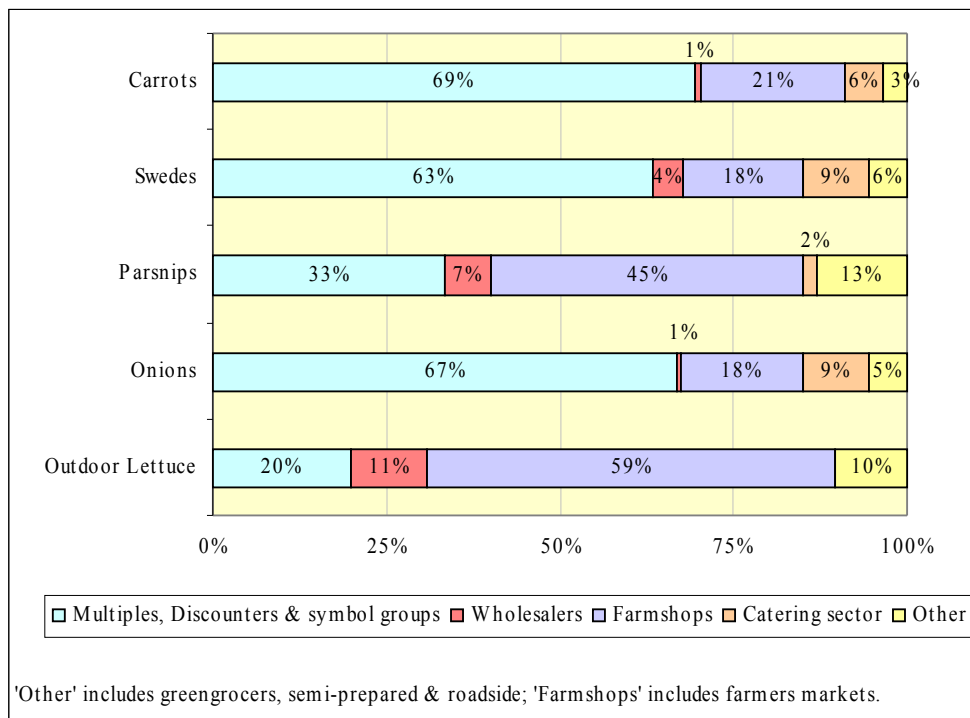
Of the 21 organic growers, the top 5 growers in terms of production area account for 69% of total organic production area.

Chart 40: Market Outlets for Organic Brassica Crops 2008



Most certified organic brassica production is sold through retailers (multiples, discounters and symbol groups) and wholesalers. However, a higher proportion is sold through farmshops/ farmers markets than is the case for non-organic field vegetable crops.

Chart 41: Market Outlets for Organic Root Crops & Outdoor Lettuce 2008



Most certified organic carrots, swedes and onions are sold through retailers (multiples, discounters and symbol groups). However, farmshops/ farmers markets account for most (59%) organic outdoor lettuce production, and 45% of organic parsnip production.

## Section Six: Appendix Tables

## Appendix One: Production Area, Value, Number of Growers & Employment

Table 1.1: Field Vegetable Production 1999-2008 by County

	1999				2002				2005				2008			
	Number of Growers	Hectares	Total Farmgate Value (€m)	Average Value per Hectare	Number of Growers	Hectares	Total Farmgate Value (€m)	Average Value per Hectare	Number of Growers	Hectares	Total Farmgate Value (€m)	Average Value per Hectare	Number of Growers	Hectares	Total Farmgate Value (€m)	Average Value per Hectare
Clare	3	6	€ 0.08	€ 14,443	3	6	€ 0.11	€ 17,621	*	*	*	*	*	*	*	*
Cork	35	449	€ 3.14	€ 6,988	24	415	€ 3.31	€ 7,974	26	529.0	€6.2	€11,720	27	409.3	€4.8	€11,678
Donegal	6	13	€ 0.08	€ 6,189	6	9	€ 0.05	€ 5,528	4	16.0	€0.2	€12,500	4	15.7	€0.5	€28,662
Dublin	127	1,924	€ 18.98	€ 9,864	94	1,764	€ 21.98	€ 12,459	68	1,739.0	€23.7	€13,629	63	2,156.8	€32.2	€14,939
Galway	19	89	€ 0.37	€ 4,166	12	44	€ 0.17	€ 3,851	10	51.0	€0.6	€11,765	11	75.5	€1.1	€14,299
Kerry	16	86	€ 0.59	€ 6,821	11	81	€ 0.47	€ 5,844	8	70.0	€0.9	€12,857	8	144.3	€1.5	€10,256
Kildare	3	62	€ 0.51	€ 8,186	4	79	€ 0.31	€ 3,913	*	*	*	*	4	118.8	€1.3	€10,691
Kilkenny	10	210	€ 1.94	€ 9,218	8	158	€ 1.56	€ 9,898	7	130.0	€1.8	€13,846	8	151.2	€2.6	€17,331
Laois	4	108	€ 1.62	€ 15,035	4	152	€ 1.99	€ 13,071	4	125.0	€2.0	€16,000	4	132.3	€2.7	€20,189
Limerick	5	20	€ 0.14	€ 7,078	4	10	€ 0.07	€ 6,620	3	14.0	€0.2	€14,286	3	19.7	€0.3	€17,303
Louth	11	118	€ 1.20	€ 10,135	8	96	€ 1.36	€ 14,166	10	99.0	€1.4	€14,141	11	152.3	€3.1	€20,028
Meath	30	589	€ 4.80	€ 8,146	22	551	€ 5.00	€ 9,064	21	618.0	€8.6	€13,916	15	508.7	€8.5	€16,710
Monaghan	*	*	*	*	*	*	*	*	4	7.0	€0.0	€1,429	*	*	*	*
Offaly	14	193	€ 1.13	€ 5,871	11	131	€ 0.47	€ 3,574	9	118.0	€1.4	€11,864	8	139.5	€2.1	€14,691
Roscommon	14	20	€ 0.08	€ 3,775	8	12	€ 0.04	€ 3,324	8	14.0	€0.2	€14,286	7	10.7	€0.1	€10,280
Sligo	8	31	€ 0.19	€ 6,082	6	9	€ 0.04	€ 4,145	3	19.0	€0.2	€10,526	*	*	*	*
Tipperary	8	46	€ 0.43	€ 9,334	4	38	€ 0.32	€ 8,341	*	*	*	*	*	*	*	*
Waterford	14	109	€ 1.28	€ 11,764	16	104	€ 0.89	€ 8,478	12	94.0	€1.5	€15,957	10	87.5	€1.3	€14,977
Westmeath	2	14	€ 0.12	€ 8,859	3	6	€ 0.05	€ 7,340	3	5.0	€0.1	€10,000	*	*	*	*
Wexford	35	408	€ 4.37	€ 10,711	35	533	€ 5.13	€ 9,625	25	447.0	€6.1	€13,647	16	403.9	€6.4	€15,919
Wicklow	*	*	*	*	4	17	€ 0.28	€ 16,838	5	15.0	€0.2	€13,333	5	29.2	€0.7	€25,377
Other Counties *	13	58	€ 0.41	€ 7,195	7	55	€ 0.35	€ 6,255	8	156.5	€2.1	€13,287	8	34.3	€0.6	€18,076
<b>Total</b>	<b>377</b>	<b>4,554</b>	<b>€ 41.47</b>	<b>€ 9,107</b>	<b>294</b>	<b>4,272</b>	<b>€ 43.93</b>	<b>€ 10,284</b>	<b>238</b>	<b>4,267</b>	<b>€57.4</b>	<b>€13,446</b>	<b>212</b>	<b>4,590</b>	<b>€69.7</b>	<b>€15,191</b>

\* only a small number of growers. Production figures added to 'Other counties' for this census year in order to protect grower confidentiality.

Table 1.2: Field Vegetable Employment 1999-2008 by County

	1999				2002				2005				2008			
	Full time employees	Part time employees	Part time employees as full time equivalents	Total full-time employment	Full time employees	Part time employees	Part time employees as full time equivalents	Total full-time employment	Full time employees	Part time employees	Part time employees as full time equivalents	Total full-time employment	Full time employees	Part time employees	Part time employees as full time equivalents	Total full-time employment
Cork	58	182	44.9	103	51	58	14.6	66	55	63	25.9	81	51	39	11.3	62
Donegal	1	8	3.3	4	1	6	3.0	4	4	3	0.5	5	5	8	4.0	9
Dublin	258	414	126.4	384	266	340	105.8	372	258	208	87.6	346	314	186	85.1	399
Galway	4	66	20.1	24	6	13	5.1	11	2	12	5.8	8	16	7	3.0	19
Kerry	20	43	16.3	36	7	11	5.5	13	15	9	3.5	18	15	7	3.5	19
Kildare	*	*	*	*	*	*	*	*	*	*	*	*	22	20	9.4	31
Kilkenny	72	107	34.2	106	24	52	19.3	43	19	24	10.3	29	45	58	20.0	65
Laois	8	24	12.5	21	9	26	14.2	23	30	5	2.0	32	29	2	1.0	30
Limerick	4	9	2.8	7	3	9	3.0	6	18	50	19.0	37	6	1	0.3	6
Louth	14	32	11.9	26	17	34	14.5	32	2	0	0.0	2	23	62	15.8	38
Meath	76	122	42.9	119	50	58	31.2	81	59	71	27.8	87	42	52	25.5	68
Offaly	11	64	20.3	31	23	5	10.0	33	28	16	6.2	34	25	11	4.5	30
Roscommon	2	26	7.2	9	2	8	2.0	4	1	7	2.3	3	9	1	0.5	10
Sligo	3	18	8.5	12	4	6	2.5	7	4	0	0.0	4	*	*	*	*
Waterford	14	39	14.8	29	25	5	2.0	27	18	22	5.3	23	17	17	7.4	24
Westmeath	1	11	3.4	4	1	1	2.8	4	4	0	0.0	4	*	*	*	*
Wexford	27	133	46.4	73	54	61	52.2	106	51	96	38.4	89	44	63	26.8	71
Wicklow	*	*	*	*	6	4	8.0	14	12	8	2.8	15	8	26	7.5	16
Other Counties*	24	74	18.6	43	27	44	17.2	45	18	23	9.8	28	13	5	2.5	16
<b>Total</b>	<b>597</b>	<b>1372</b>	<b>434.5</b>	<b>1,032</b>	<b>577</b>	<b>741</b>	<b>312.7</b>	<b>890</b>	<b>598</b>	<b>617</b>	<b>246.8</b>	<b>844</b>	<b>683</b>	<b>565</b>	<b>228.0</b>	<b>911</b>

\* only a small number of growers. Employment figures added to 'Other counties' for this census year in order to protect grower confidentiality.

## Appendix Two: Details of Field Vegetable Crops Grown

Table 2.1: Field Vegetable Production 1999-2008

	1999				2002				2005				2008			
	Growers	Hectares	Total Farmgate Value (€m)	Value Per Hectare <sup>(1)</sup>	Growers	Hectares	Total Farmgate Value (€m)	Value Per Hectare <sup>(1)</sup>	Growers	Hectares	Total Farmgate Value (€m)	Value Per Hectare <sup>(1)</sup>	Growers	Hectares	Total Farmgate Value (€m)	Value Per Hectare <sup>(1)</sup>
<b>Leafy Brassicas</b>																
Cabbage - Pointed	170	452	€ 2.68	€ 5,939	118	379	€ 2.93	€ 7,717	102	347	€ 4.72	€ 13,600	109	386	€ 6.75	€ 17,496
Cabbage - Savoy*	-	-	-	-	113	375	€ 3.14	€ 8,379	63	142	€ 1.45	€ 10,200	73	155	€ 2.43	€ 15,718
Cabbage - White or Storage	37	175	€ 1.33	€ 7,579	48	157	€ 1.47	€ 9,330	16	53	€ 0.67	€ 12,550	19	90	€ 1.17	€ 13,073
Cabbage - Red*	-	-	-	-	9	6	€ 0.07	€ 11,206	8	13	€ 0.22	€ 16,805	21	11	€ 0.13	€ 12,717
Cabbage - Winter (round)*	146	450	€ 2.73	€ 6,051	-	-	-	-	60	261	€ 2.35	€ 9,000	74	297	€ 2.91	€ 9,798
Cauliflowers	115	641	€ 5.02	€ 7,821	102	505	€ 4.33	€ 8,580	70	424	€ 5.61	€ 13,250	71	434	€ 4.62	€ 10,642
Broccoli	115	470	€ 3.84	€ 8,174	96	420	€ 3.24	€ 7,712	75	547	€ 5.41	€ 9,893	85	618	€ 4.39	€ 7,100
Brussels Sprouts	58	239	€ 2.28	€ 9,534	31	276	€ 3.27	€ 11,854	25	181	€ 2.09	€ 11,591	29	179	€ 2.13	€ 11,887
Kale	5	10	€ 0.06	€ 6,157	6	13	€ 0.15	€ 11,477	9	11	€ 0.03	€ 3,050	15	10	€ 0.12	€ 11,147
<b>Root Crops</b>																
Carrots	97	641	€ 6.97	€ 10,878	94	694	€ 8.16	€ 11,754	83	718	€ 12.52	€ 17,439	76	681	€ 15.40	€ 22,616
Swedes	141	559	€ 3.55	€ 6,351	102	475	€ 3.40	€ 7,156	93	503	€ 4.54	€ 9,030	97	512	€ 5.97	€ 11,661
Parsnips	62	273	€ 2.65	€ 9,706	53	295	€ 3.92	€ 13,289	56	363	€ 5.99	€ 16,500	57	348	€ 4.63	€ 13,311
Beetroot	3	0	€ 0.00	€ 4,534	7	21	€ 0.11	€ 5,187	15	3	€ 0.01	€ 4,000	14	3	€ 0.04	€ 12,684
White Turnips	4	4	€ 0.02	€ 4,895	9	17	€ 0.18	€ 10,640	**	**	**	**	9	10	€ 0.04	€ 4,489
<b>Salad Crops/Leafy Vegetables</b>																
Lettuce - Iceberg	20	131	€ 3.50	€ 26,793	14	99	€ 1.82	€ 18,311	12	120	€ 2.69	€ 22,370	13	111	€ 2.75	€ 24,797
Lettuce - Lollo Rossa types	23	30	€ 0.39	€ 13,300	22	27	€ 0.35	€ 13,021	19	17	€ 0.20	€ 11,700	22	34	€ 0.91	€ 26,928
Lettuce - Butterhead	7	6	€ 0.25	€ 40,753	11	24	€ 0.46	€ 18,866	10	6	€ 0.02	€ 3,520	11	7	€ 0.14	€ 20,558
Lettuce - Oak Leaf*	-	-	-	-	-	-	-	-	16	14	€ 0.12	€ 8,550	23	21	€ 0.53	€ 25,095
Lettuce - Other*	3	2	€ 0.04	€ 16,864	9	2	€ 0.04	€ 17,403	8	18	€ 0.16	€ 9,000	13	16	€ 0.36	€ 22,564
Spinach/Chinese Leaves	10	13	€ 0.17	€ 13,687	9	31	€ 0.35	€ 11,197	9	59	€ 0.10	€ 1,650	17	98	€ 1.48	€ 15,049
<b>Alliums</b>																
Onions	26	162	€ 1.09	€ 6,703	24	152	€ 1.12	€ 7,369	20	135	€ 2.12	€ 15,750	29	179	€ 2.34	€ 13,058
Scallions	40	77	€ 1.70	€ 22,116	30	71	€ 1.53	€ 21,388	15	96	€ 2.16	€ 22,499	20	108	€ 5.50	€ 50,864
Leeks and Shallots	45	66	€ 0.90	€ 13,621	28	69	€ 1.28	€ 18,646	35	66	€ 1.16	€ 17,640	41	72	€ 1.43	€ 19,842
<b>Stalk Crops</b>																
Celery	28	42	€ 0.97	€ 23,377	22	47	€ 1.18	€ 25,006	19	50	€ 1.92	€ 38,500	17	46	€ 1.41	€ 30,584
<b>Other Minor Field Vegetables</b>																
Rhubarb	23	54	€ 0.50	€ 9,242	19	38	€ 0.38	€ 9,980	14	44	€ 0.33	€ 7,500	19	46	€ 0.54	€ 11,672
<b>Squashes</b>																
Pumpkins	-	-	-	-	10	18	€ 0.06	€ 3,161	11	22	€ 0.08	€ 3,540	11	24	€ 0.19	€ 7,666
Courgettes and Marrows	17	8	€ 0.06	€ 7,320	6	2	€ 0.03	€ 12,767	15	11	€ 0.13	€ 11,571	20	14	€ 0.13	€ 8,885
<b>Herbs</b>																
Parsley	22	27	€ 0.50	€ 18,544	13	25	€ 0.42	€ 16,982	15	26	€ 0.26	€ 10,000	19	58	€ 0.91	€ 15,746
Thyme	9	2	€ 0.02	€ 8,457	6	3	€ 0.04	€ 13,508	4	3	€ 0.04	€ 13,800	10	8	€ 0.16	€ 20,221
Other Herbs	5	2	€ 0.06	€ 29,365	9	9	€ 0.23	€ 26,818	5	7	€ 0.21	€ 30,000	9	8	€ 0.16	€ 18,939
<b>Legumes</b>																
Beans - French	-	-	-	-	3	0	€ 0.01	€ 23,476	**	**	**	**	4	0.105	€ 0.004	€ 34,286
Beans - Broad	-	-	-	-	4	0	€ 0.00	€ 15,651	**	**	**	**	4	0.12	€ 0.002	€ 19,375
Peas - Green	3	1	€ 0.01	€ 6,746	-	-	-	-	**	**	**	**	4	1.82	€ 0.041	€ 22,692
Mange Tout*	-	-	-	-	-	-	-	-	-	-	-	-	3	0.12	€ 0.002	€ 17,083
Other Legumes*	-	-	-	-	5	9	€ 0.14	€ 15,289	-	-	-	-	-	-	-	-
<b>Other</b>																
Other	27	15	€ 0.15	€ 10,628	7	7	€ 0.10	€ 14,471	0	0	-	-	5	4	€ 0.03	€ 7,790
<b>Total</b>	<b>377</b>	<b>4,554</b>	<b>€ 41.47</b>	<b>€ 9,106</b>	<b>294</b>	<b>4,272</b>	<b>€ 43.93</b>	<b>€ 10,283</b>	<b>238</b>	<b>4,267</b>	<b>€ 57.37</b>	<b>€ 13,446</b>	<b>212</b>	<b>4,590</b>	<b>€ 69.7</b>	<b>€ 15,191</b>

\* there were some differences in the definitions of categories between censuses.

\*\* value withheld to protect grower confidentiality (only a small number of growers in category).

(1) Average value per hectare was calculated by dividing total farmgate value by total hectares.

Table 2.2: Yield and Farmgate Value 2008\*

	Average Yield per Hectare <sup>(1)</sup>	Average Farmgate Value per Unit <sup>(2)</sup>
<b>Leafy Brassicas</b>		
Cabbage - Pointed	36,706 heads per ha.	€0.48 per head
Cabbage - Savoy	31,053 heads per ha.	€0.51 per head
Cabbage - White or Storage	49 tonnes per ha.	€267 per tonne <sup>(7)</sup>
Cabbage - Red	33 tonnes per ha. <sup>(3)</sup>	€386 per tonne
Cabbage - Winter (round)	24 tonnes per ha.	€408 per tonne
Cauliflowers	16,187 heads per ha. <sup>(4)</sup>	€0.66 per head
Broccoli	6 tonnes per ha.	€1,202 per tonne
Brussels Sprouts	13 tonnes per ha.	€910 per tonne
Kale	13 tonnes per ha.	€834 per tonne <sup>(8)</sup>
<b>Root Crops</b>		
Carrots (maincrop)	54 tonnes per ha.	€432 per tonne
Swedes	31 tonnes per ha.	€378 per tonne
Parsnips	14 tonnes per ha. <sup>(5)</sup>	€978 per tonne
Beetroot	10 tonnes per ha.	€1,253 per tonne
White Turnips	5 tonnes per ha.	€978 per tonne
<b>Salad Crops/Leafy Vegetables</b>		
Lettuce - Iceberg	51,524 heads per ha.	€0.48 per head
Lettuce - Lollo Rossa types	56,063 heads per ha.	€0.48 per head
Lettuce - Butterhead	54,640 heads per ha.	€0.37 per head
Lettuce - Oak Leaf	49,281 heads per ha.	€0.51 per head
Lettuce - Other	50,161 heads per ha.	€0.45 per head
Spinach	14 tonnes per ha.	€978 per tonne
<b>Alliums</b>		
Onions	38 tonnes per ha.	€343 per tonne
Scallions	148,599 bunches of 6/ha.	€0.34 per bunch of 6
Leeks and Shallots	19 tonnes per ha.	€1,054 per tonne
<b>Stalk Crops</b>		
Celery	62,451 heads per ha.	€0.49 per head
<b>Other Minor Field Vegetables</b>		
Rhubarb	19,229 bunches of 6/ha.	€0.61 per bunch of 6
<b>Squashes</b>		
Pumpkins	5,215 pumpkins per ha. <sup>(6)</sup>	€1.47 per pumpkin
Courgettes	7 tonnes per ha.	€1,288 per tonne
<b>Herbs</b>		
Parsley	6 tonnes per ha.	€2,815 per tonne
Thyme	3 tonnes per ha.	€5,918 per tonne
Other Herbs	4 tonnes per ha.	€4,968 per tonne
<b>Legumes</b>		
Beans - French	6 tonnes per ha.	€5,538 per tonne
Beans - Broad	6 tonnes per ha.	€3,207 per tonne
Peas - Green	7 tonnes per ha.	€3,048 per tonne
Other Legumes	3 tonnes per ha.	€5,125 per tonne

\* figures based on all growers for a particular crop. Table 1 in report is based on the top-5 growers only.

Note that weather conditions were poor in 2008 and impacted on the yield and quality of many crops. Also that price per unit can vary significantly depending on market supplied and level of value added at the farm level.

- (1) Average yield per hectare calculated by dividing total yield by total hectares.
- (2) Average farmgate value per unit calculated by dividing total value by total yield.
- (3) Several red cabbage growers achieved 40 tonnes/ha but some had lower yields due to adverse weather conditions (i.e. reducing overall average yield).
- (4) Several cauliflower growers achieved 20,000 heads/ha but some had lower yields due to adverse weather conditions (i.e. reducing overall average yield).
- (5) Several parsnip growers achieved 20 tonnes/ha but some had lower yields due to adverse weather conditions (i.e. reducing overall average yield).
- (6) There was a wide variation in the yields achieved by pumpkin growers.
- (7) €350 would be a more representative average. One larger grower had low price, thereby bringing down average.
- (8) €600 to €650 would be a more representative average for the larger kale growers.

## Appendix Three: Farm Facilities

Table 3.1: Number of Growers with Field Vegetable Facilities 2005-2008 by County

	2005								2008							
	Propagation Tunnels	Harvesting Rigs	Washing Facilities	Graders	Packhouse Stores	Cold stores	Other Stores	Chilled Transport	Propagation Tunnels	Harvesting Rigs	Washing Facilities	Graders	Packhouse Stores	Cold stores	Other Stores	Chilled Transport
Cork	10	**	12	8	13	11	9	26	4	10	14	5	20	15	16	6
Donegal	1	**	2	1	3	0	1	4	1	0	2	2	2	1	0	0
Dublin	26	**	20	14	39	34	32	48	22	37	19	14	38	37	28	9
Galway	0	**	5	1	5	3	8	3	5	1	2	0	8	3	9	1
Kerry	2	**	5	1	2	3	0	5	1	2	5	3	4	3	2	2
Kildare	*	**	*	*	*	*	*	*	4	1	2	3	4	2	3	1
Kilkenny	2	**	3	2	2	3	0	1	4	3	4	2	8	6	5	1
Laois	1	**	3	2	4	3	1	4	1	3	3	3	4	3	1	1
Limerick	8	**	6	7	10	4	5	6	1	0	2	1	2	1	1	0
Louth	1	**	1	0	0	0	1	1	8	4	5	4	8	7	7	1
Meath	5	**	9	10	17	10	14	8	2	11	9	9	14	12	14	2
Offaly	4	**	3	3	7	8	2	4	1	5	4	2	6	6	6	3
Roscommon	1	**	3	1	5	3	6	0	0	0	2	0	1	0	0	0
Sligo	0	**	3	2	3	0	0	1	*	*	*	*	*	*	*	*
Waterford	0	**	8	7	8	6	6	0	1	6	8	4	8	7	1	1
Westmeath	1	**	1	0	0	0	0	0	*	*	*	*	*	*	*	*
Wexford	2	**	5	4	11	7	3	2	2	6	5	4	11	10	5	2
Wicklow	5	**	2	0	4	5	4	2	5	1	4	2	5	4	4	3
Other Counties *	6	**	6	5	6	4	3	5	3	1	4	0	5	2	3	1
<b>Total</b>	<b>75</b>	<b>**</b>	<b>97</b>	<b>68</b>	<b>139</b>	<b>104</b>	<b>95</b>	<b>120</b>	<b>65</b>	<b>91</b>	<b>94</b>	<b>58</b>	<b>148</b>	<b>119</b>	<b>105</b>	<b>34</b>

\* only a small number of growers. Figures added to 'Other counties' for this census year in order to protect grower confidentiality.

\*\* not asked in 2005 census.

Table 3.2: Number of Growers with Field Vegetable Facilities 2008 by Area/Volume

	Propagation Tunnels (square metres)			Pack-house (square metres)			Cold Store (cubic metres)			Other Store (cubic metres)		
	<300m <sup>2</sup>	301-900m <sup>2</sup>	>900m <sup>2</sup>	<100m <sup>2</sup>	101-300m <sup>2</sup>	>300m <sup>2</sup>	<150m <sup>3</sup>	151-400m <sup>3</sup>	>400m <sup>3</sup>	<200m <sup>3</sup>	201-1,000m <sup>3</sup>	>1,000m <sup>3</sup>
Number of growers	33	14	18	57	59	32	72	26	21	35	46	24

Total number of growers = 212.

End.