

Hardy Nursery Stock Census 2006

Introduction

The 2006 Hardy Nursery Stock Census was compiled from a comprehensive survey of 117 nurseries. The census provides an overview of production, employment and sector value. The data for the census is collected by inspectors of the Department of Agriculture, Fisheries and Food (DAFF).

Previous censuses were conducted in 2000 and 1997, and included all nurseries. In the 2006 census, small nurseries associated with retail garden centres were excluded. For this reason, comparisons with previous censuses are difficult and are only shown for sector value.

Bord Bia and DAFF wish to thank the nurseries and Teagasc for their co-operation in the census.

Executive Summary

The total production area for hardy nursery stock in 2006 is 691 hectares: 570 hectares (83%) is open field production; 70 hectares (10%) is outdoor containerised production; and 51 hectares (7%) is greenhouse production (i.e. glasshouses and fixed polythene tunnels).

The sector employs 647 people full-time and 347 people part-time, corresponding to 793 'full time equivalent' jobs.

The value of nursery sales in 2005 was €25.9 million.

In outdoor production, there are 536 hectares of deciduous trees, 83 hectares of ornamental plants, and 21 hectares of conifers. Tipperary accounts for over half (51%) of outdoor production, with 329 hectares.

In greenhouse production, Kildare and Kilkenny account for 49% of production area.

There were an estimated 7.9 million plants imported by Irish nurseries in 2005, with 75% being imported from the Netherlands. The value of plant imports was €12.4 million in 2005, an increase of over 300% since 1997. Exports amounted to 2.4 million plants, of which 68% were to Britain and 28% were to Northern Ireland.

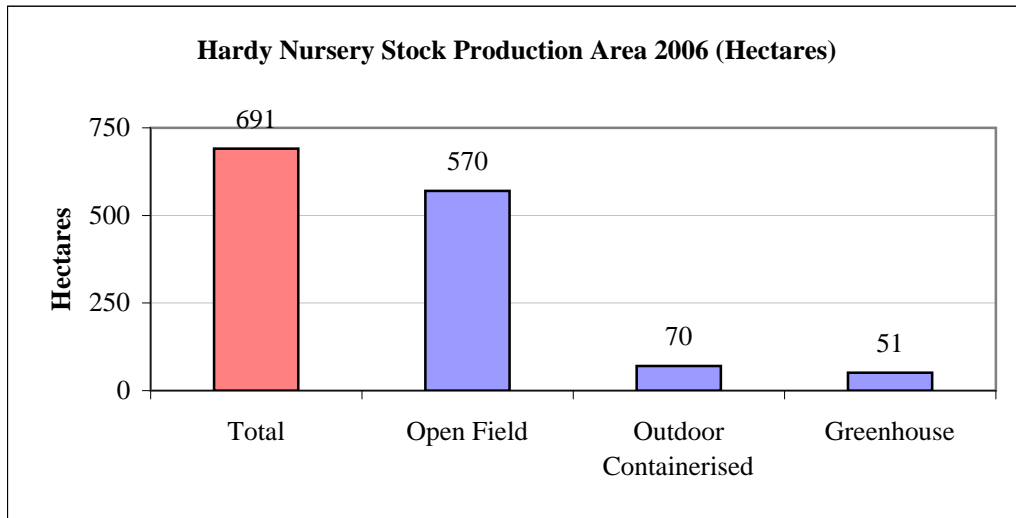
The main barrier to expansion is competition from imports, mentioned by 29% of nurseries. High production costs were the second biggest barrier, mentioned by 23%.

Notes:

For convenience, figures in this report are rounded.

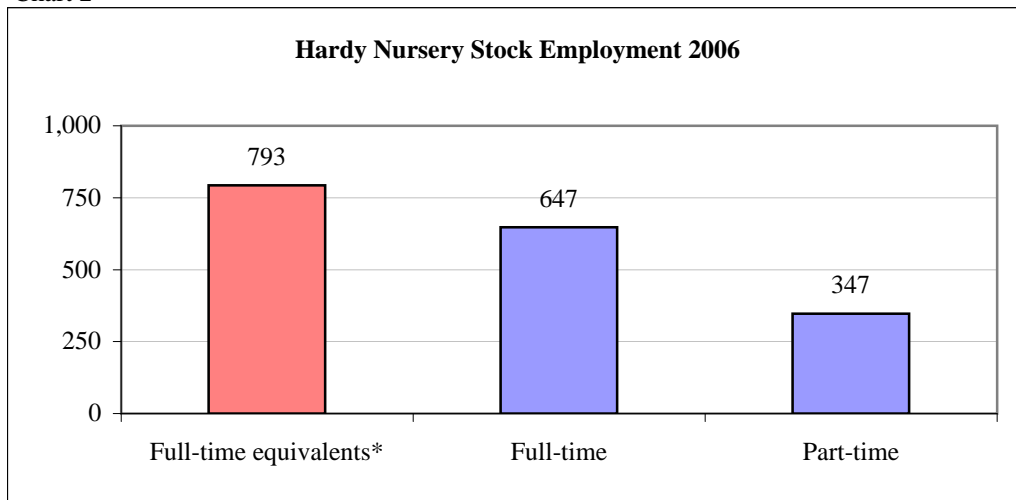
Statistical analysis for this census was carried out by Franklin Research Ltd.

Chart 1



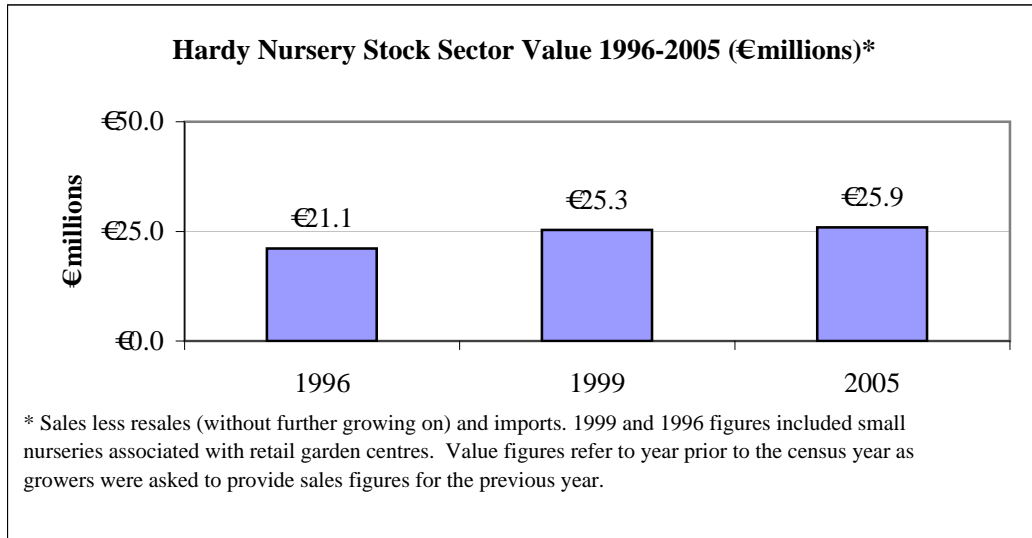
· The total production area for hardy nursery stock in 2006 is 691 hectares. Of this, 570 hectares (83%) is open field production of hardy nursery stock, 70 hectares (10%) is outdoor containerised production and 51 hectares (7%) is greenhouse production (i.e. glasshouses and fixed polythene tunnels).

Chart 2



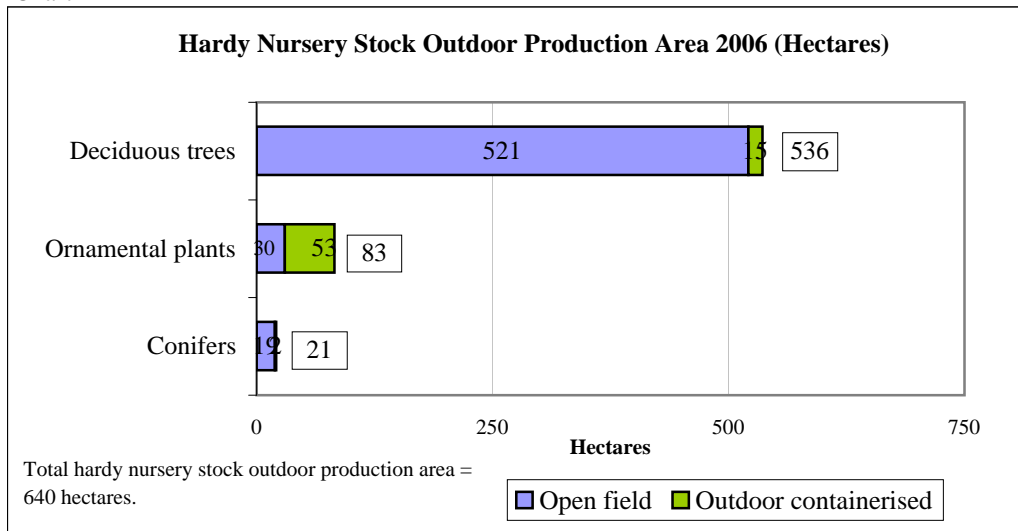
· The hardy nursery stock sector employs 647 people full-time and 347 people part-time. In 'full-time equivalent' terms (i.e. converting the part-time jobs into the number of full-time jobs they would represent), the sector employs 793 people.

Chart 3



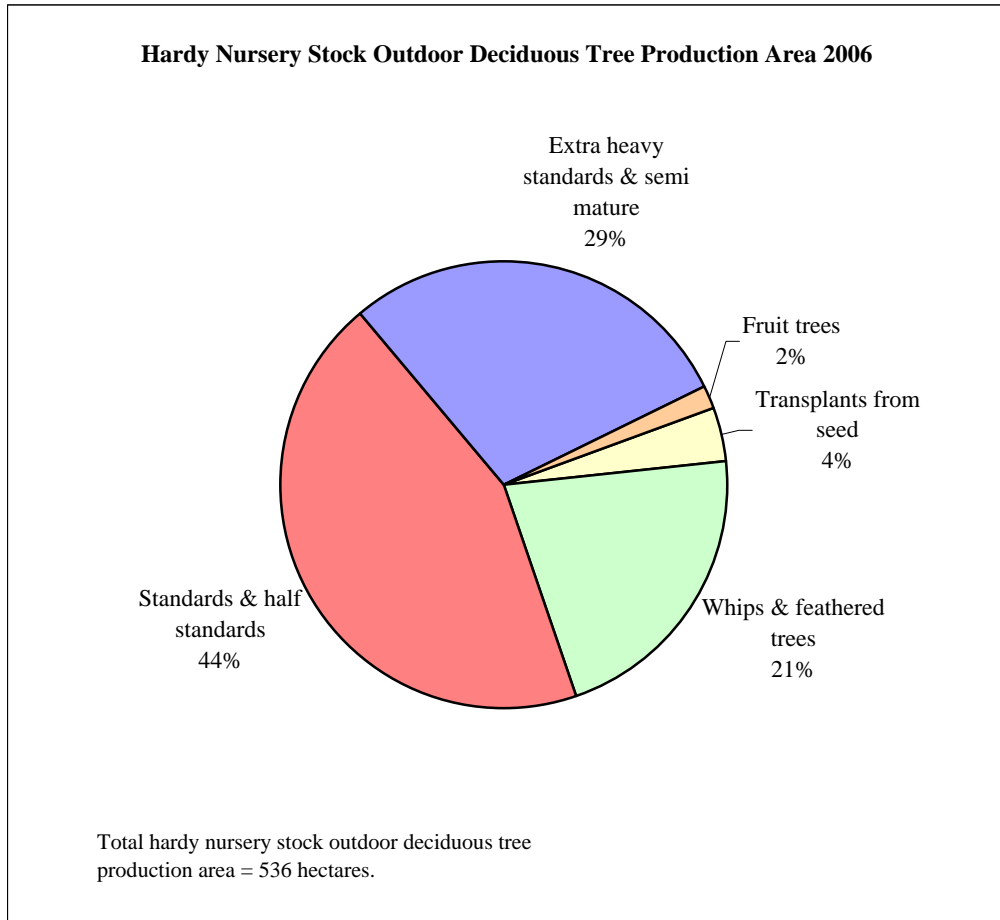
· The estimated value of the hardy nursery stock sector in 2005 is €25.9 million. Value estimates for 1999 and 1996 are shown as a guide but these censuses included nurseries with retail garden centres which were excluded from the 2006 census.

Chart 4



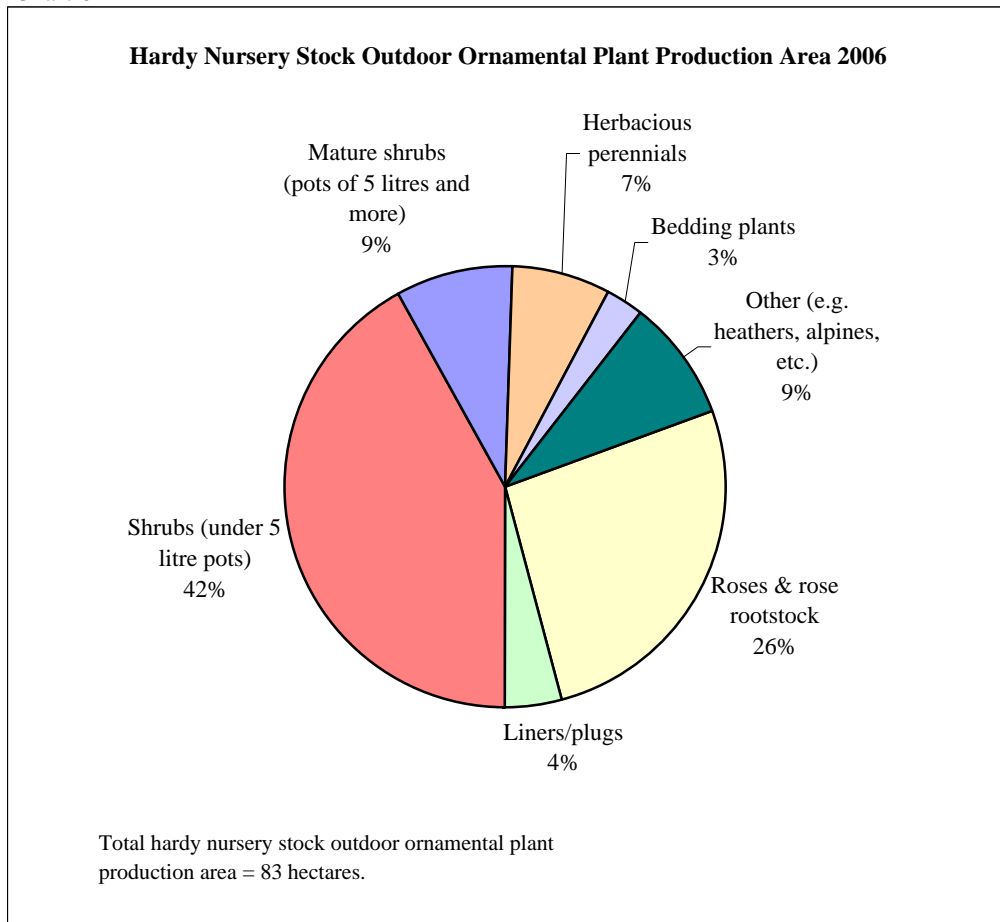
- There are 536 hectares of deciduous trees in production in nurseries in 2006. Most of this area (521 hectares) is open field production with only 15 hectares being outdoor containerised production.
- There are 21 hectares of coniferous tree in production in 2006, with 19 hectares in open field production and 2 hectares in outdoor containerised production.
- There are 83 hectares of ornamental plants in production in 2005, with 30 hectares in open field production and 53 hectares in outdoor containerised production.

Chart 5



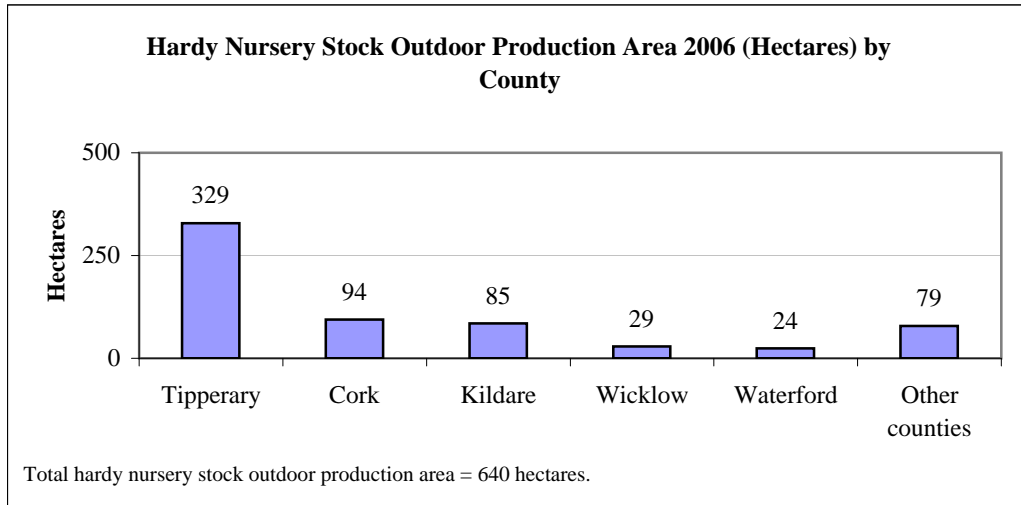
· 'Standard and half standard trees' account for 44% (237 hectares) of outdoor deciduous tree production area. These are followed by 'extra heavy standards & semi mature trees' (29%, 154 hectares) and 'whips and feathered trees' (21%, 114 hectares).

Chart 6



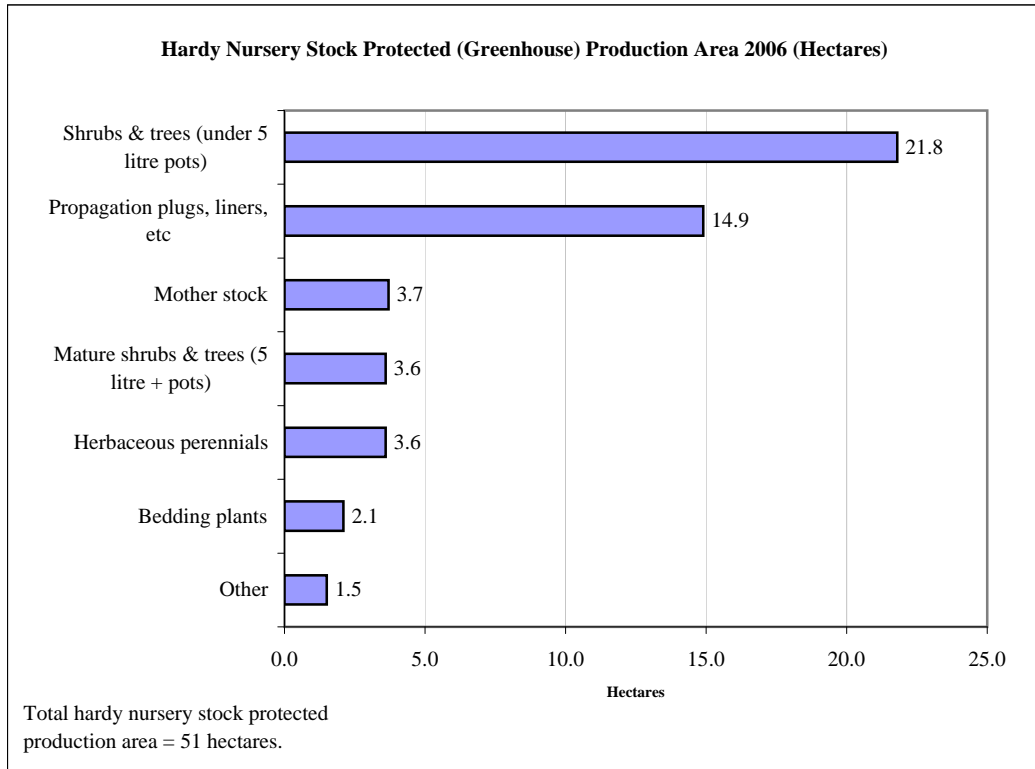
· 'Shrubs in pots under 5 litres' account for 42% (35 hectares) of outdoor ornamental plant production, followed by 'rose and rose rootstock' which account for 26% (22 hectares).

Chart 7



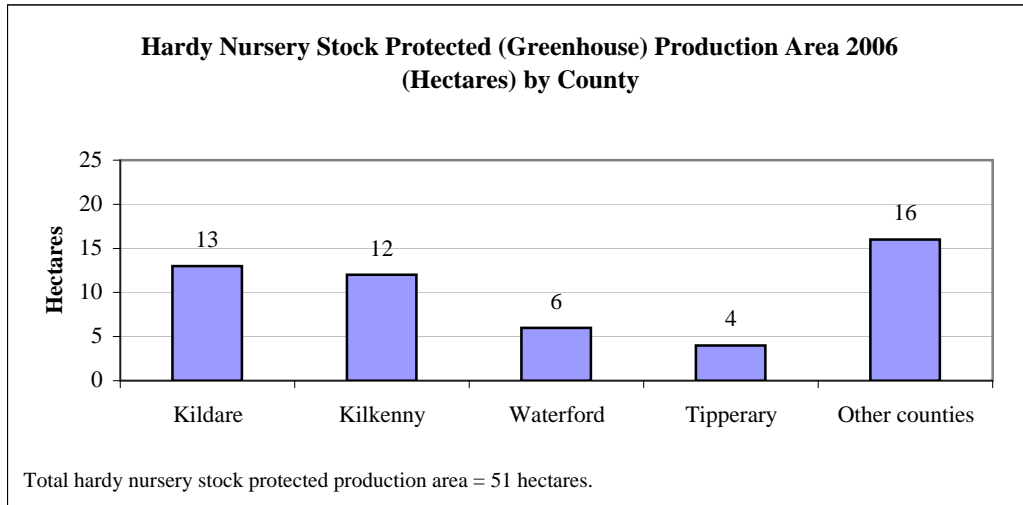
· Tipperary has 329 hectares of outdoor (open field and outdoor containerised) production in 2006, accounting for 51% of outdoor production area. Tipperary (51%), Cork (15%) and Kildare (13%) combined account for 79% of outdoor production.

Chart 8



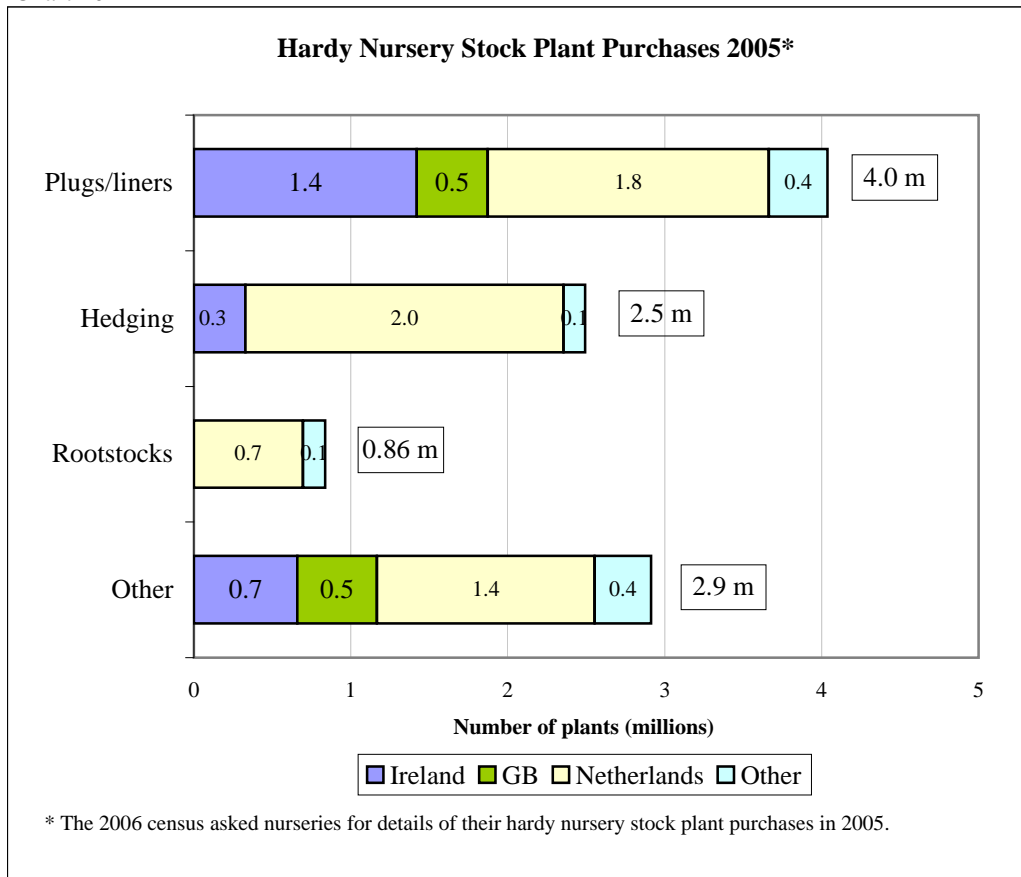
· In protected production (i.e. production in glasshouses and fixed polythene tunnels), there are 21.8 hectares of 'shrubs and trees in pots under 5 litres' in 2006 and 14.9 hectares of 'propagation, plugs and liners.'

Chart 9



· Kildare, Kilkenny, Waterford and Tipperary are the counties with the largest areas of hardy nursery stock under protection. Kildare and Kilkenny have 13 hectares and 12 hectares respectively, accounting for 49% of protected production area.

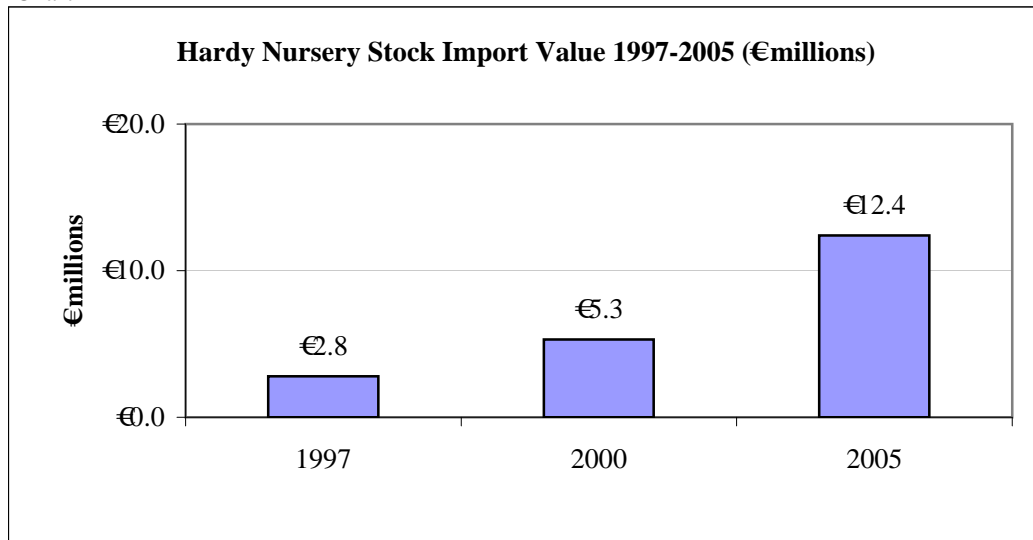
Chart 10



· Irish nurseries purchased 5.9 million plants from the Netherlands in 2005, making it the most important source of plant purchases. The Netherlands accounted for 44% of plugs/liners purchases, 80% of hedging purchases, 81% of rootstock purchases and 48% of 'other' plant purchases.

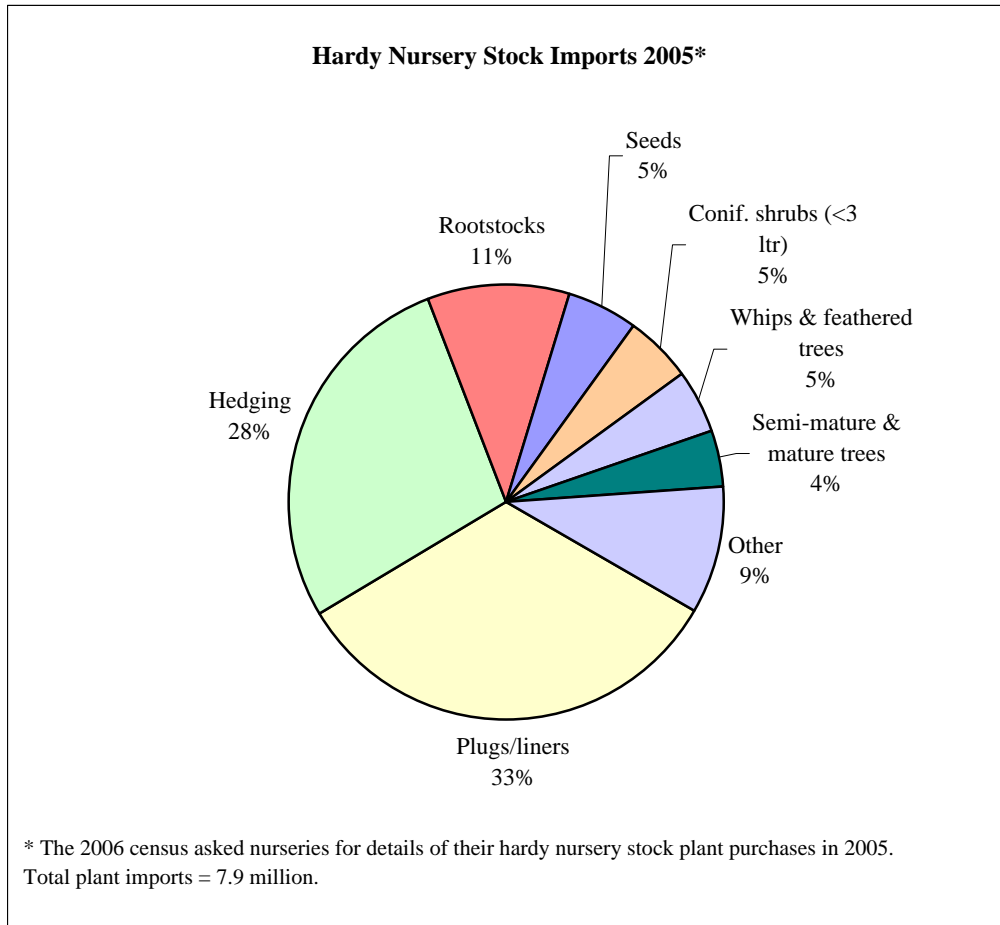
· Irish nurseries purchased 2.4 million plants in Ireland in 2005, making Ireland the second most important source of plant purchases. Ireland accounted for 35% of plugs/liners purchases, 13% of hedging purchases, 2% of rootstock purchases and 23% of 'other' plant purchases.

Chart 11



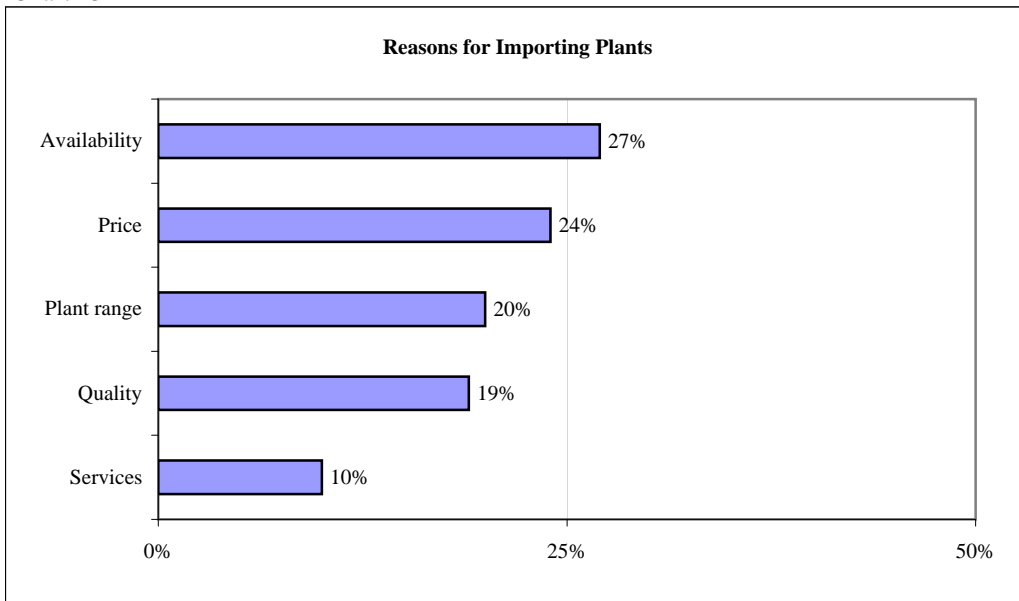
· The value of plant imports by Irish nurseries was €12.4 million in 2005, an increase of over 300% since 1997.

Chart 12



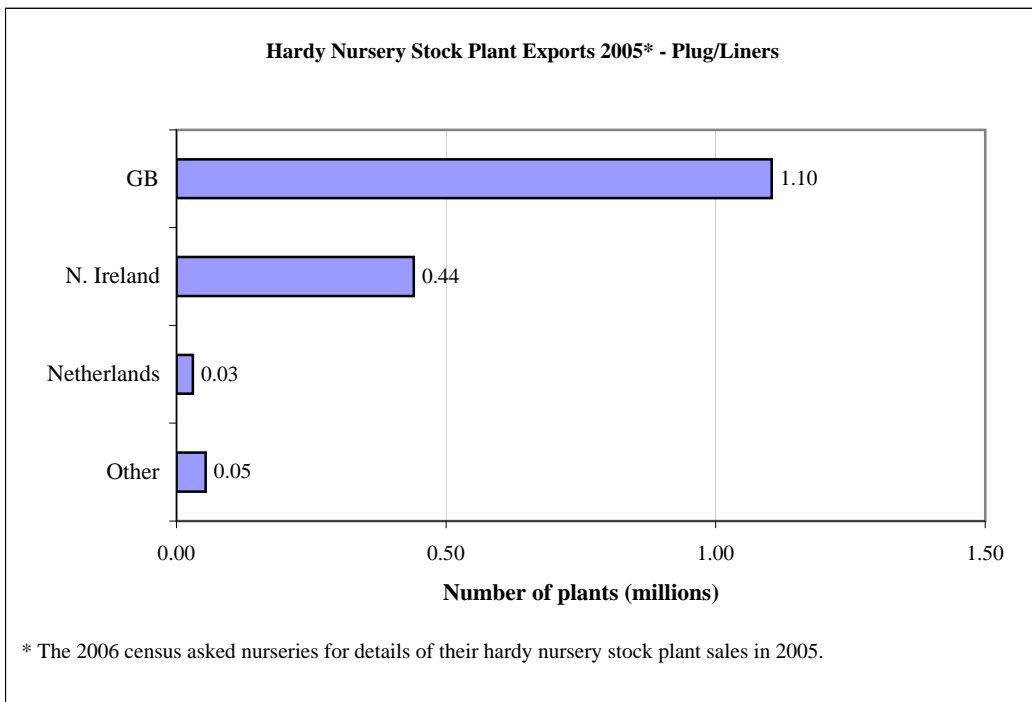
· Plugs/liners purchases account for 33% (2.6 million) of imported plants, followed by hedging plants at 28% (2.2 million) and rootstocks at 11% (0.8 million).

Chart 13



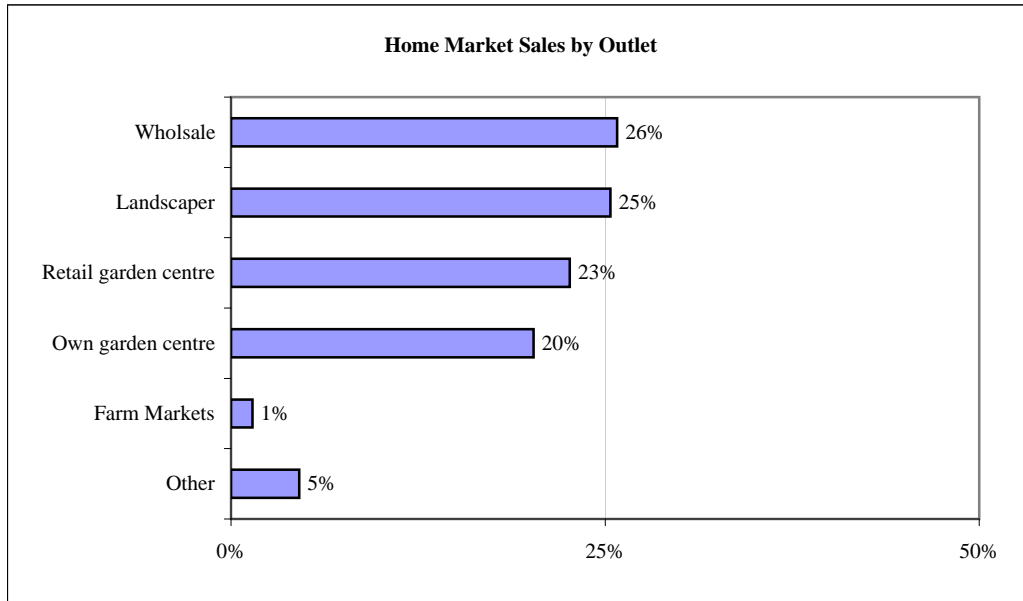
· There were a variety of reasons for importing plants with availability mentioned by 27% of nurseries and price mentioned by 24%.

Chart 14



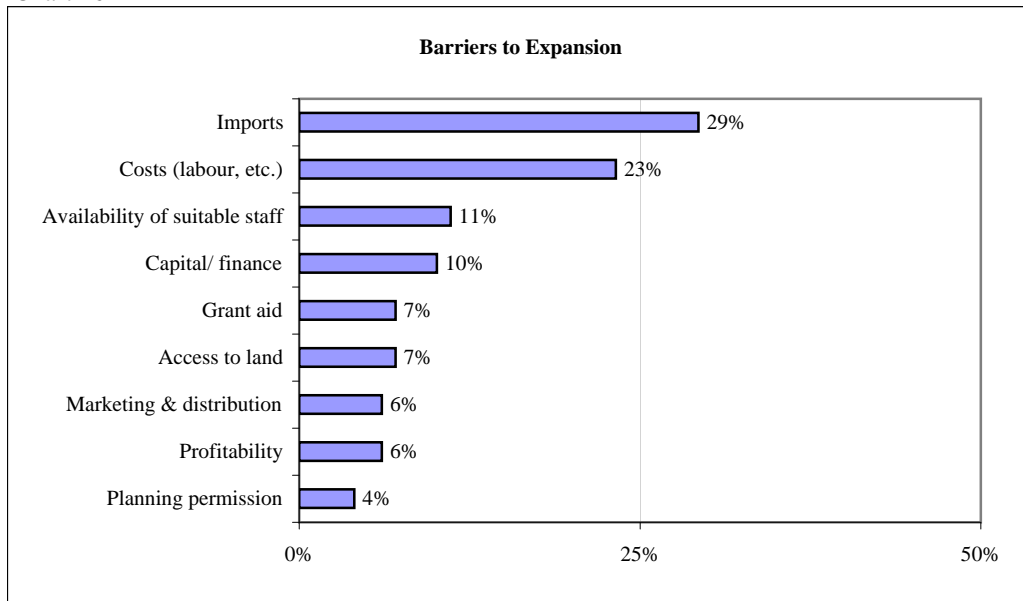
· 'Plugs, liners' are the only plant category being exported in significant volumes by Irish nurseries (see table 3.2 in Appendix). Most of these are sold to Great Britain and Northern Ireland.

Chart 15



· Nurseries were asked to specify the percent of their domestic sales that are sold through different channels. The average percent of sales sold through wholesale is 26%, landscapers is 25%, retail garden centres is 23% and the nursery's own garden centre accounts for an average of 20% of domestic sales.

Chart 16



· The main barrier to expansion, mentioned by 29% of nurseries, is competition from imported plants. High production costs were mentioned by 23% (which is also linked to profitability, mentioned by 6%).