

Soft Fruit & Protected Crop Census 2008



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Soft Fruit & Protected Crop Census 2008

Introduction

The Soft Fruit & Protected Crop Census 2008 was conducted among growers of outdoor soft fruit, protected food crops (i.e. fruit and vegetables) and protected amenity crops. Excluded from the census are field vegetable crops, outdoor amenity crops, the mushroom sector and hardy nursery stock.

This report compares results from 2008 with the previous census, conducted in 2004. Comparisons with earlier censuses are also made where data is available: a census of outdoor and protected soft fruit growers conducted in 1999; censuses of protected food and amenity growers conducted in 1998 and 2001.

The 2008 surveys were carried out by Department of Agriculture, Fisheries & Food (DAFF) personnel, with analysis of the results being conducted by Bord Bia. Bord Bia and DAFF wish to thank all the growers and Teagasc for their co-operation in carrying out the census.

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Notes:

The figures provided in this document are based on the best information available to Bord Bia.

For convenience, some figures have been rounded.

Data analysis for this census was carried out by Franklin Research, Dun Laoghaire, Co. Dublin.

Executive Summary

There are 213 growers of soft fruit and protected crops in 2008, with a total production area of 598 hectares. The production value of the sector is estimated at €73 million, of which €26 million is from protected soft fruit, €25 million from protected vegetables, €20 million from protected amenity plants and €2 million from outdoor soft fruit. The soft fruit and protected crop sector provides 662 full-time jobs and 902 part-time jobs.

The overall trend is of declining grower numbers and increasing production area and value. This trend reflects some small and medium sized growers leaving the sector, increasing specialisation, larger production operations, and production of higher value crop lines.

Soft Fruit

The soft fruit sector reflects overall trends, with grower numbers declining but both production area and value increasing since the last census. The other key trend is the continued decline in outdoor soft fruit production, and increasing production under protection (i.e. in glasshouses, fixed/mobile tunnels and cloches).

The total number of soft fruit growers has more than halved over the last decade: from 181 growers in 1999, to 95 growers in 2004, to 70 growers in 2008 (i.e. a decline of 61% between 1999 and 2008). However, soft fruit production area has increased by 21% since the last census (from 304 hectares in 2004 to 367 hectares in 2008) while production value has increased by 14% (from €25.1 million in 2004 to €28.7 million in 2008).

Outdoor soft fruit production has fallen significantly over the decade: from 443 hectares in 1999, to 172 hectares in 2004, to 158 hectares in 2008 (i.e. a decline of 64% between 1999 and 2008). In contrast, the area of soft fruit produced under protection has more than doubled: from 81 hectares in 1999, to 132 hectares in 2004, to 209 hectares in 2008 (i.e. an increase of 158% between 1999 and 2008).

The soft fruit sector is dominated by strawberry production, which accounts for 93% of soft fruit production value. There are 61 (outdoor and protected) strawberry growers in 2008 (down from 82 growers in 2004) with a total production area of 224 hectares (up from 185 hectares in 2004). Production value of strawberries is €26.5 million, a 22% increase since the 2004 census. The primary counties for strawberry production are Wexford, Dublin and Louth. Strawberry production is primarily under protected structures, especially polythene structures. The sector is dominated by larger growers. Of the 51 protected strawberry growers, the five largest growers account for 70% of protected strawberry production area.

Protected Vegetables

The key trend in the protected vegetable sector is declining grower numbers and, with the exception of lettuce, declining production area. Production value has, however, increased. Protected vegetable production is predominantly under glass (rather than polythene structures) and production is concentrated in county Dublin.

Grower numbers in the protected vegetable sector are less than half what they were a decade ago: the number of protected lettuce growers fell from 66 growers in 1998 to 24 in 2008 (i.e. a 64% decrease); tomato grower numbers fell from 47 growers in 1998 to 21 in 2008 (i.e. a 55% decrease); cucumber grower numbers fell from 20 growers in 1998 to just 7 in 2008 (i.e. a 65% decrease); and protected celery grower numbers fell from 22 growers in 1998 to 6 in 2008 (i.e. a 73% decrease).

Tomatoes are the most important protected vegetable crop in terms of value. Production area for tomatoes has fallen 33% since the last census (from 21 hectares in 2004 to 14 hectares in 2008). Production value has, however, increased by 21% (from €7.6 million in 2004 to €9.2 million in 2008). The increase in production value is attributable to increasing grower efficiency and production of higher value lines. Of the total of 21 tomato growers, the largest five growers account for 51% of protected tomato production area.

Lettuce is the second most important protected vegetable crop in terms of value. The total production area for lettuce in 2008 is 113 hectares, up from 108 hectares in 2004. Production value of lettuce is €7.4 million in 2008, a 90% increase since the 2004

census. Of the total of 24 lettuce growers, the largest five growers account for 74% of protected lettuce production area.

Amenity Plants

The trend in the amenity plant sector is a decrease in grower numbers (attributable to a decrease in the number of bedding plant growers), a marginal increase in production area and an increase in production value. Production of amenity plants is predominantly under glass (rather than polythene structures). The main counties for amenity plant production are Cork, Meath and Dublin.

Bedding plants are the most important plant in the amenity plant sector in terms of area and value. The trend between 1998 and 2004 was for an increase in both grower numbers and production area of bedding plants. The 2008 census, however, shows this sector to be in decline. The number of bedding plant growers fell from 93 growers in 2004 to 76 growers in 2008, while production area of bedding plants fell from 41 hectares in 2004 to 37 hectares in 2008. Production value of bedding plants is €9.0 million in 2008, a 7% decrease since the 2004 census. Of the total of 76 bedding plant growers, the largest 5 growers account for 58% of production area.

Protected Structures

Total protected structure area has increased by 64% since the last census (from 203 hectares in 2004, to 333 hectares in 2008). Of this, 196 hectares are glasshouses and 137 hectares are polythene structures. Glasshouses are mostly (56%) used for vegetable production, while polythene tunnels are mostly (88%) used for soft fruit production.

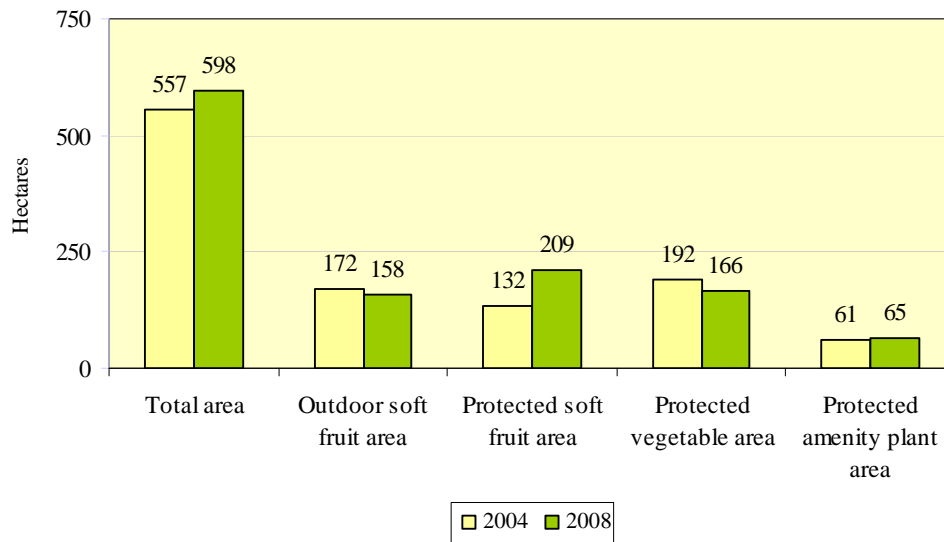
Storage Facilities

Total storage facility area has also increased since the last census. The total area for cold storage facilities increased by 58% (from 22,199 cubic metres in 2004 to 35,048 cubic metres in 2008), while pack-house area increased by 21% (from 32,963 square metres in 2004 to 39,768 square metres in 2008).

Section One: Summary Data for Outdoor Soft Fruit and Protected Crops Sectors

This section provides data for the entire outdoor soft fruit and protected crop sector. It provides aggregate information on all the key measures such as production area, number of growers, estimated value of production and employment. Data on individual sub-sectors is presented in later sections.

Chart 1: Production Area of Soft Fruit & Protected Crops 2004 & 2008 (Hectares)



The total production area for outdoor soft fruit and protected crops in 2008 is 598 hectares. This is a 7% increase from the 2004 census (557 hectares in 2004).

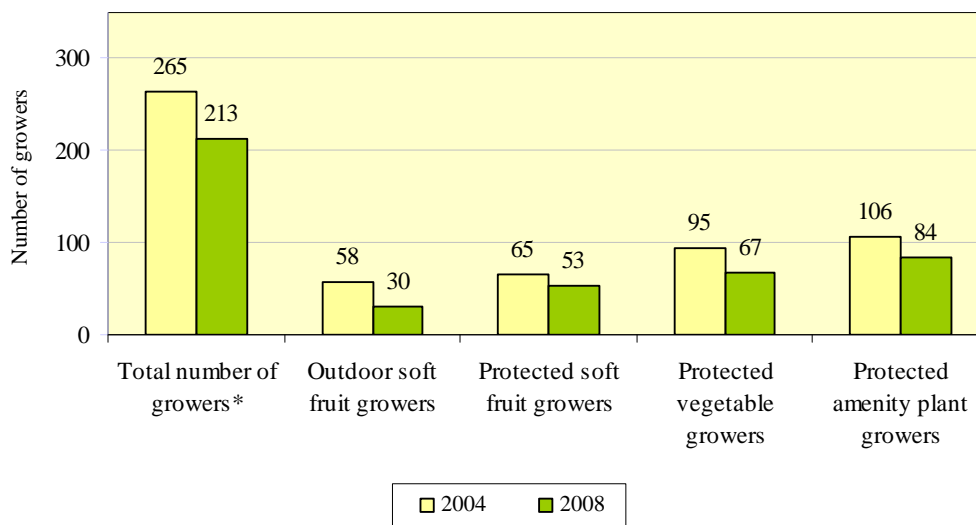
The production area for outdoor soft fruit is 158 hectares in 2008, down from 172 hectares in 2004. However, the production area for protected soft fruit has increased, from 132 hectares in 2004 to 209 hectares in 2008.

The production area for protected vegetables is 166 hectares in 2008, down from 192 hectares in 2004.

The production area for protected amenity plants is 65 hectares in 2008, up slightly from 61 hectares in 2004.

It should be noted that the above figures include multiple plantings. For example, a grower producing 5 crops of lettuce on a one hectare plot would be recorded as having a production area of 5 hectares for lettuce. Similarly, growers of other crops such as strawberries and cucumbers may also have multiple plantings.

Chart 2: Number of Growers of Soft Fruit & Protected Crops 2004 & 2008



*Less than the sum of all sectors because some growers grow more than one crop type.

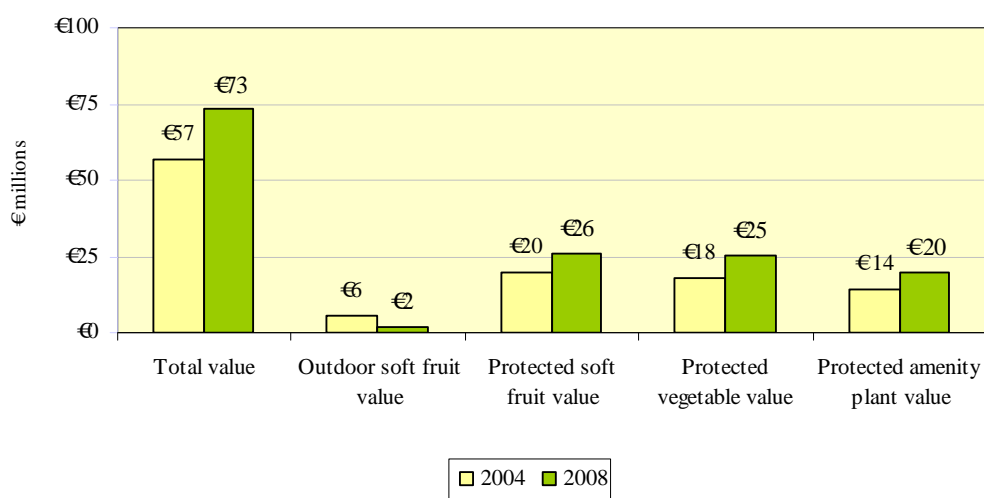
There are 213 growers in the outdoor soft fruit and protected crops sector in 2008. This is a 20% decrease in grower numbers since the last census (265 growers in 2004).

Grower numbers have decreased in all sub-sectors:

- There are 30 outdoor soft fruit growers in 2008, down from 58 in 2004
- There are 53 protected soft fruit growers in 2008, down from 65 in 2004
- There are 67 protected vegetable growers in 2008, down from 95 in 2004
- There are 84 amenity plant growers in 2008, down from 106 in 2004

Note that a grower may be involved in more than one sub-sector. For example, a grower may produce soft fruit outdoors, while also producing soft fruit or vegetables under protection.

Chart 3: Estimated Farmgate Production Value of Soft Fruit & Protected Crops 2004 & 2008 (€millions)



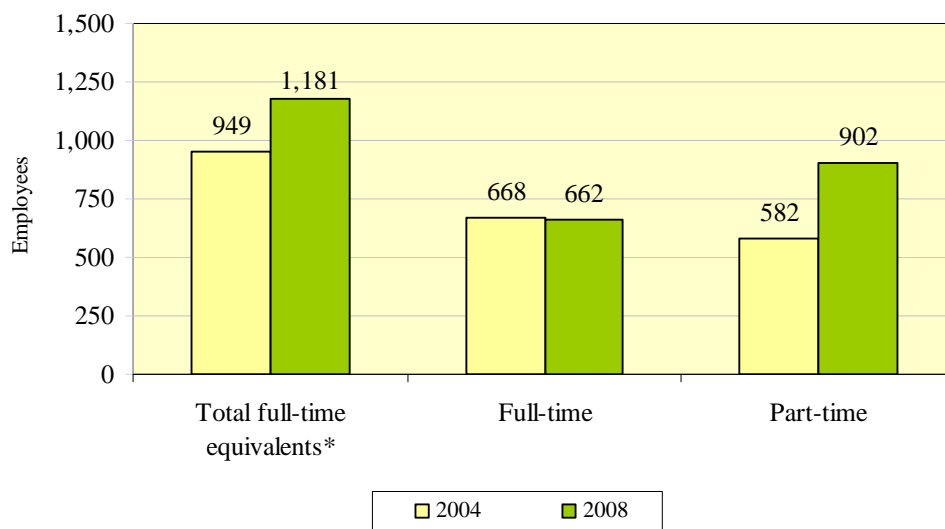
The farmgate value of the outdoor soft fruit and protected crop sector in 2008 is €73 million. This is a 28% increase since the last census (€57 million in 2004). The increase is largely attributable to an expansion in soft fruit production area and higher value lines in protected vegetables.

The farmgate value of outdoor soft fruit is €2 million in 2008, down from €6 million in 2004. However, the value of protected soft fruit increased to €26 million in 2008, from €20 million in 2004.

The farmgate value of protected vegetables is €25 million in 2008, up from €18 million in 2004.

The farmgate value of protected amenity plants is €20 million in 2008, up from €14 million in 2004.

Chart 4: Employment in Soft Fruit & Protected Sector 2004 & 2008



* Full-time jobs plus part-time jobs aggregated to the number of full-time jobs they would represent.

The outdoor soft fruit and protected crop sector provides 1,181 full-time equivalent jobs in 2008 (note: excludes seasonal pickers, see appendix 5.1). This is a 24% increase since the last census (949 full-time equivalent jobs in 2004).

The sector provides 662 full-time jobs in 2008 (almost unchanged from 668 in 2004), and 902 part-time jobs (up from 582 in 2004).

The increase in part-time work may reflect the increased labour requirements associated with intensive indoor multi-crop production systems.

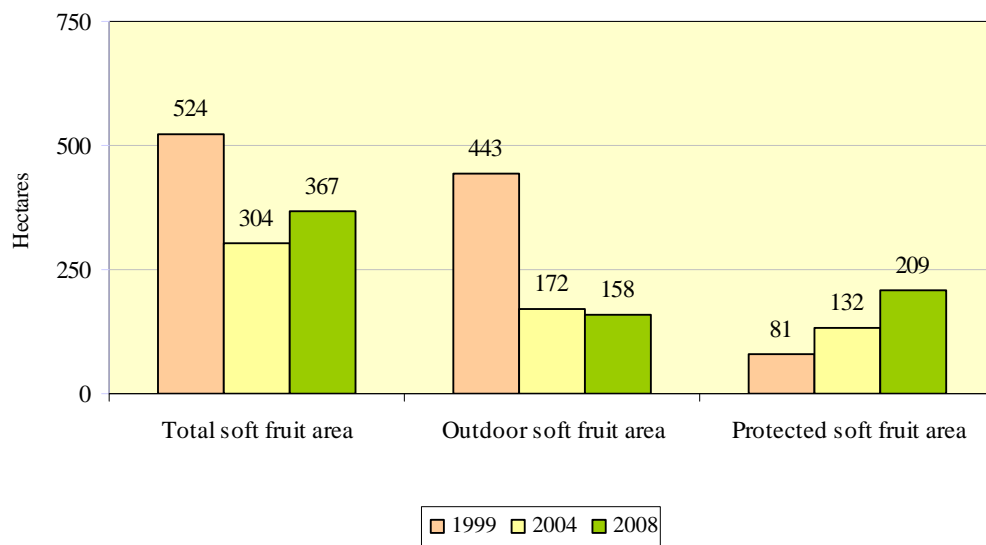
Section Two: Soft Fruit Production

Soft fruit production includes soft fruit grown outdoors and soft fruit grown under protection. The term 'soft fruit' includes fruits such as strawberries and raspberries. Apple production is not included as it is covered by a separate census. Strawberries are by far the most important soft fruit and are, therefore, profiled separately at the end of this section.

Comparisons are made with 2004 census and with the 1999 Soft Fruit census where appropriate.

The key trend seen in this section is a decline in outdoor soft fruit production, and an increase in production under protection (i.e. in glasshouses, fixed/mobile tunnels and cloches).

Chart 5: Production Area (Hectares) of Soft Fruit 1999, 2004 & 2008

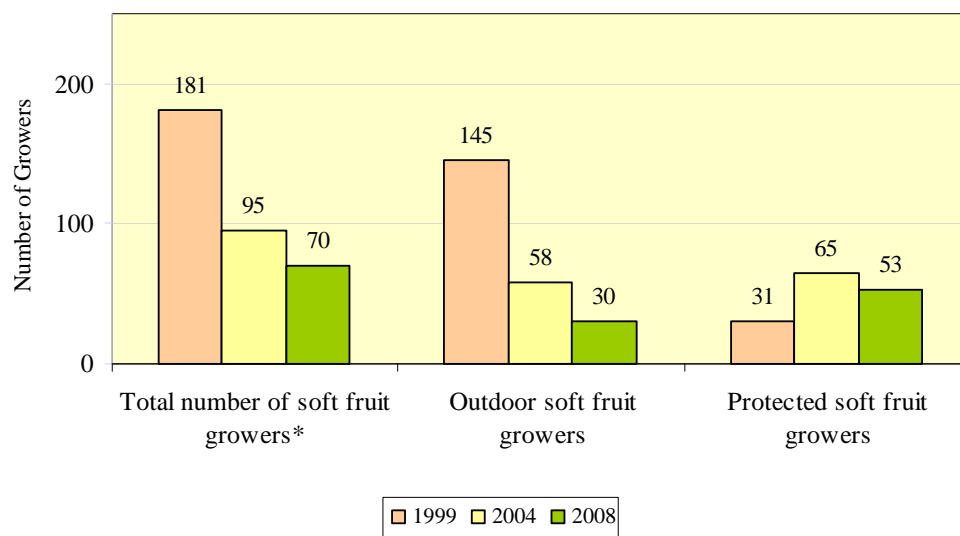


The trend in soft fruit production is towards production under protected structures. Outdoor soft fruit production area is 158 hectares in 2008 (down from 172 hectares in 2004 and 443 hectares in 1999), while protected soft fruit production area is 209 hectares (up from 132 hectares in 2004 and 81 hectares in 1999). Total soft fruit production area (outdoor + protected) is 367 hectares in 2008 (up from 304 hectares in 2004 but down from 524 hectares in 1999).

Blackcurrants grown for the processed market account for 109 of the 158 hectares of outdoor soft fruit production area. Nevertheless, in terms of production value, strawberries are by far the most important soft fruit (see Chart 8).

The availability of strawberries across an extended season (May to October) has become more balanced mostly due to the production of greater volumes of mid and late season fruit under protection. Although small in total area, there has been a recent move towards growing raspberries under protection.

Chart 6: Number of Growers of Soft Fruit 1999, 2004 & 2008

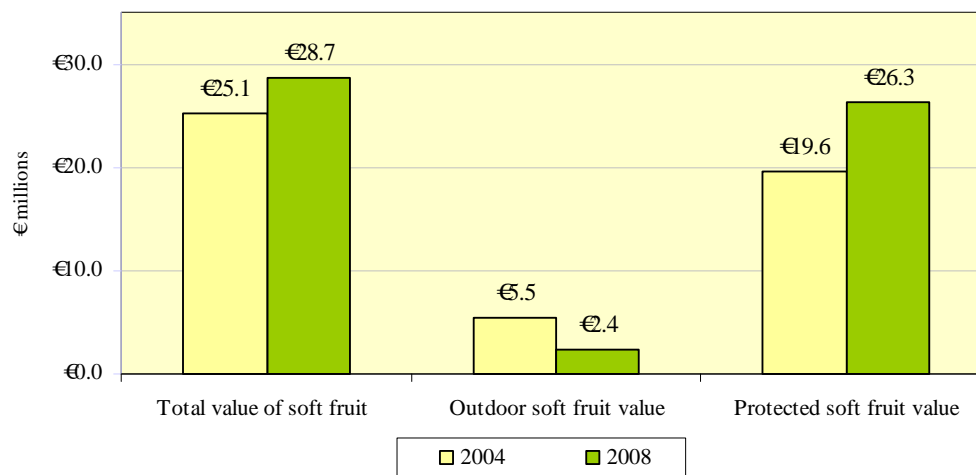


*Some growers are both outdoor and protected growers.

The total number of soft fruit growers has decreased substantially over the last decade. There are 70 soft fruit growers in 2008, as compared to 95 in 2004 and 181 in 1999 (i.e. a decline of 61% between 1999 and 2008).

The number of soft fruit growers producing outdoors is 30 in 2008 (versus 58 in 2004 and 145 in 1999), while the number of growers producing under protected structures is 53 (versus 65 in 2004 and 31 in 1999).

Chart 7: Estimated Value of Soft Fruit Production (€millions) 2004 & 2008

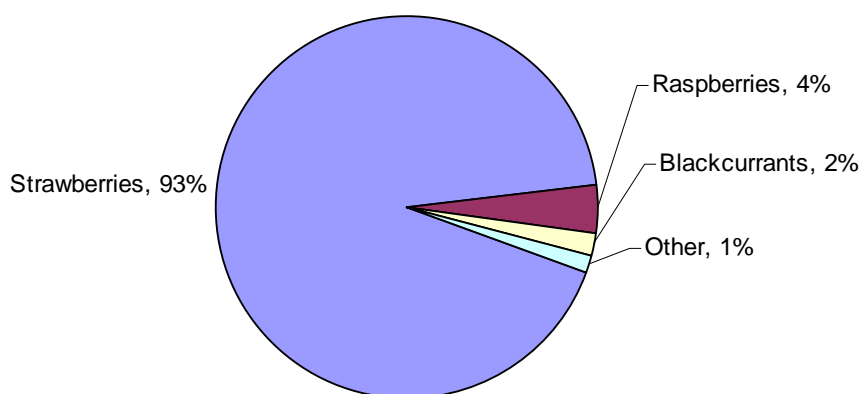


The estimated value of soft fruit production in 2008 is €28.7 million. This is a 14% increase since the last census (€25.1 million in 2004).

The value of outdoor soft fruit production is €2.4 million in 2008 (down from €5.5 million in 2004), while the value of protected soft fruit is €26.3 million (up from €19.6 million in 2004).

Comparable figures for 1999 are not available.

Chart 8: Breakdown of Value of Soft Fruit Production 2008 by Fruit Type



Strawberries are by far the most important fruit type in terms of value. The value of strawberry production accounts for 93% of the total value of soft fruit grown in Ireland.

Raspberries account for 4% of total fruit value, while blackcurrants account for 2%.

The following charts provide information on strawberry production.

Chart 9: Production Area (Hectares) of Strawberries 1999, 2004 & 2008

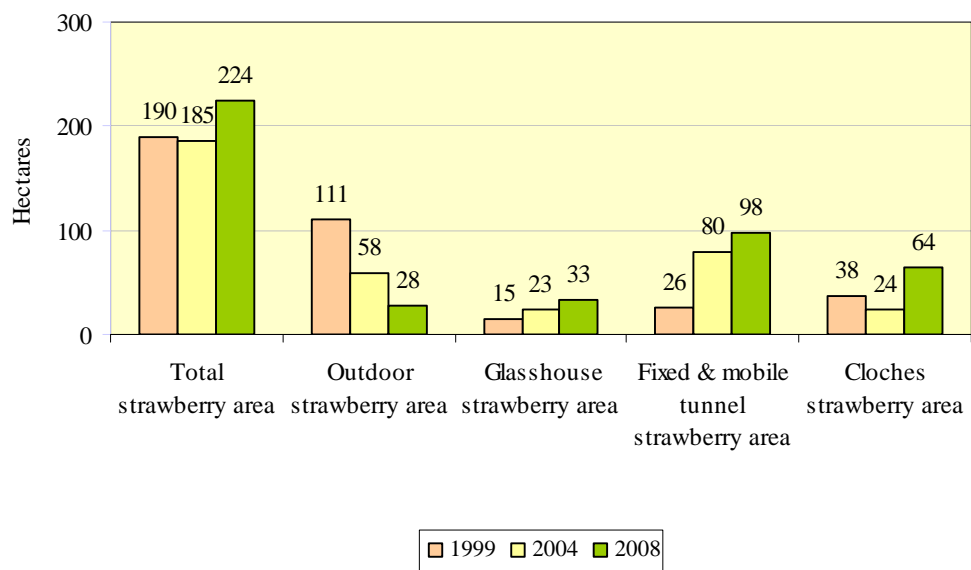


Chart 9 shows an increase in the area of strawberries produced under protection and a decrease in outdoor strawberry production.

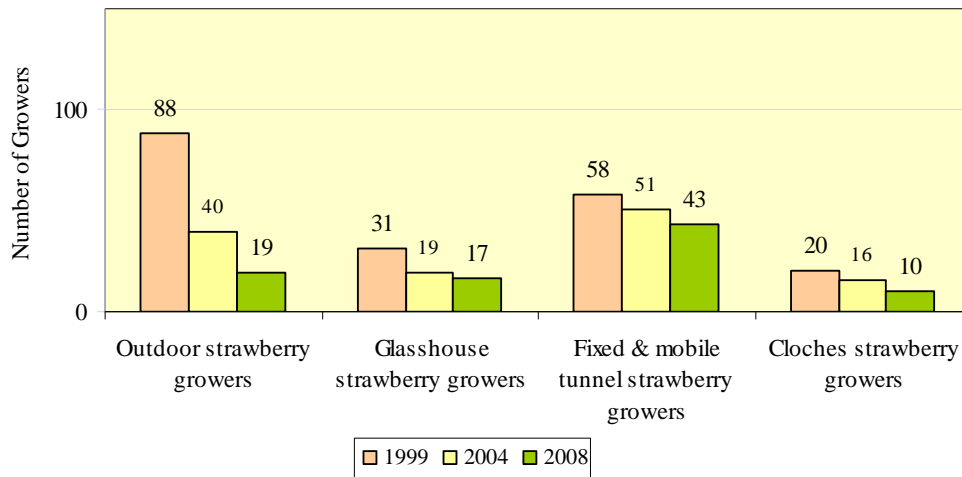
Total production area for strawberries is 224 hectares in 2008 (up from 185 hectares in 2004 and 190 hectares in 1999).

Outdoor strawberry production is 28 hectares in 2008 (down from 58 hectares in 2004 and 111 hectares in 1999). The main county for outdoor strawberries is Wexford (14.7 hectares).

Strawberry production in protected structures has increased for all types of structures. Fixed and mobile tunnels have the highest production area, with 98 hectares in 2008. However, strawberry production under cloches has more than doubled since the last census (64 hectares in 2008, up from 24 hectares in 2004). The increase in popularity of cloches may reflect the pursuit of lower cost protected growing systems by growers. The main counties for protected strawberry production are Wexford (77 hectares), Dublin (62 hectares) and Louth (20 hectares).

The main counties for raspberry production are Dublin (7 hectares) and Wexford (5 hectares).

Chart 10: Number of Growers Producing Strawberries 1999, 2004 & 2008 by Production System



Note: some growers use more than one type of production system on their farms (e.g. outdoor production and production in glasshouses).

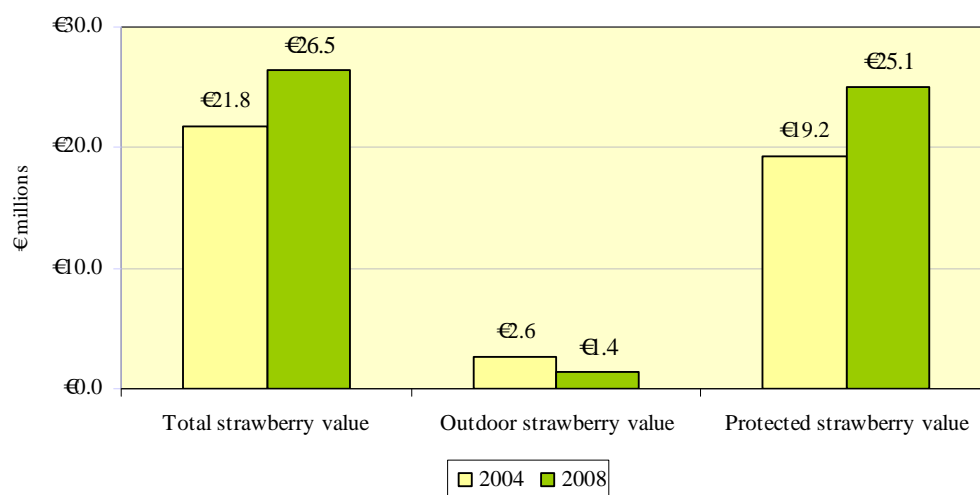
The number of strawberry growers has fallen in every category. The number of outdoor growers shows the largest decrease, falling from 88 growers in 1999 to 19 growers in 2008.

The total number of protected strawberry growers (i.e. growing under glasshouse, fixed/mobile tunnels or cloches) in 2008 is 51 growers (versus 65 in 2004).

The total number of strawberry growers (outdoor and indoor) in 2008 is 61 growers (versus 82 in 2004). (Note: this is less than the sum of the growers shown in the above chart as some growers are in more than one category).

The increase in area of protected strawberries when taken with the reduced number of growers, points towards increased scale and specialised systems of production being deployed. The net result is that there are a smaller number of more intensive growers.

Chart 11: Estimated Value of Strawberry Production (€millions) 2004 & 2008

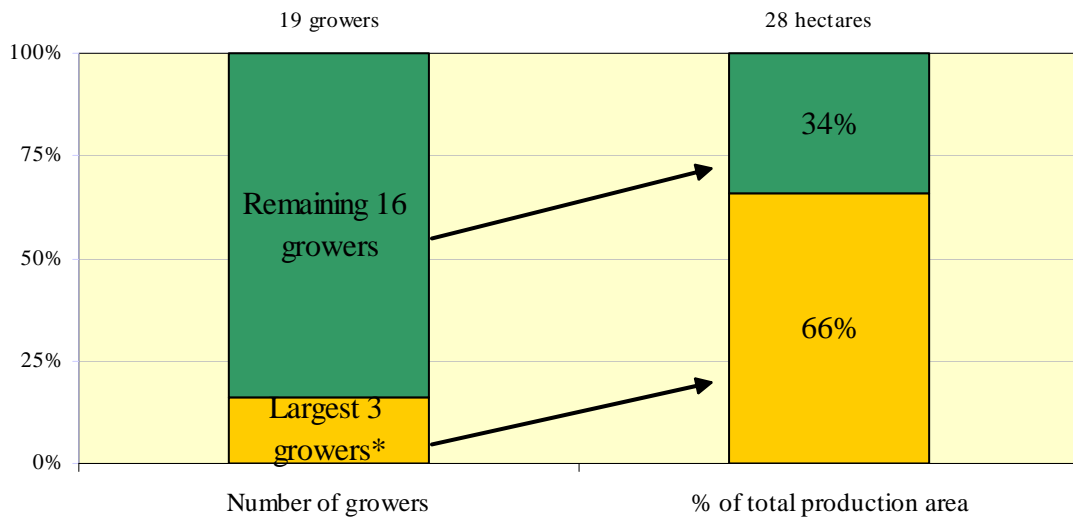


The estimated value of strawberry production in 2008 is €6.5 million. This is a 22% increase since the last census (€1.8 million in 2004).

The value of outdoor strawberry production is €1.4 million in 2008 (down from €2.6 million in 2004), while the value of protected strawberry production is €5.1 million (up from €9.2 million in 2004).

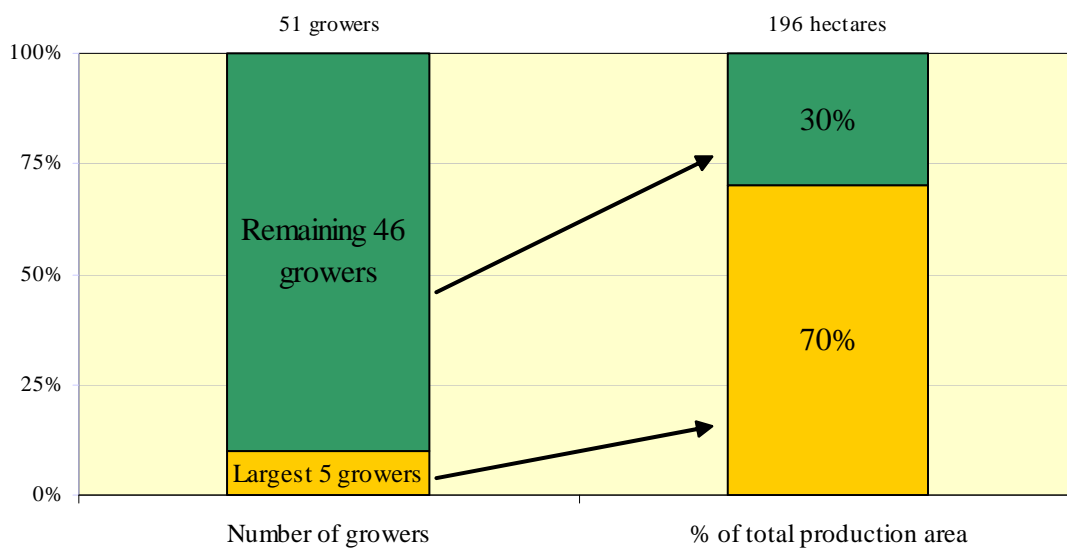
Comparable figures for 1999 are not available.

Chart 12: Contribution of Largest Outdoor Strawberry Growers by Area in 2008



Outdoor strawberry production is dominated by large-scale growers. Although there are 19 growers of outdoor strawberries, the 3 largest growers account for 66% of the total production area.

Chart 13: Contribution of Largest Protected Strawberry Growers by Area in 2004



Protected strawberry production is also dominated by a small number of large-scale growers. Though there are 51 growers of protected strawberries, the 5 largest growers account for 70% of the total production area.

Section Three: Protected Vegetable Production

This section covers all vegetables and herbs grown under protection (i.e. under glasshouses or polythene tunnels), with the exception of mushrooms which are recorded by a separate census.

Comparisons are made with the 2004 census, and with the 1998 and 2001 Protected Crop censuses where appropriate.

The key trend seen in this section is declining grower numbers and, with the exception of lettuce, declining production area.

Chart 14: Production Area (Hectares) of Protected Vegetables 2004 & 2008

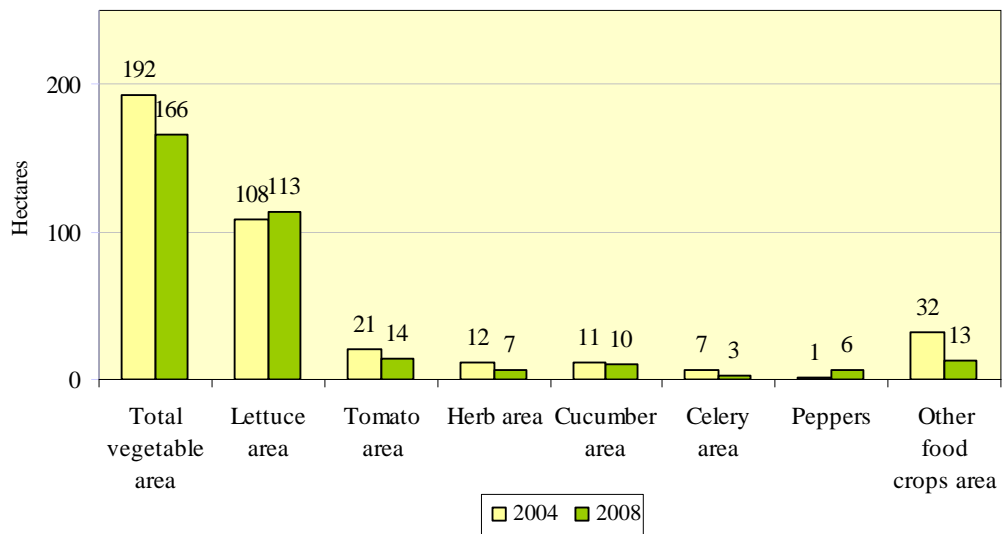


Chart 15: Production Area (Hectares) of Selected Protected Vegetables 1998, 2001, 2004 & 2008

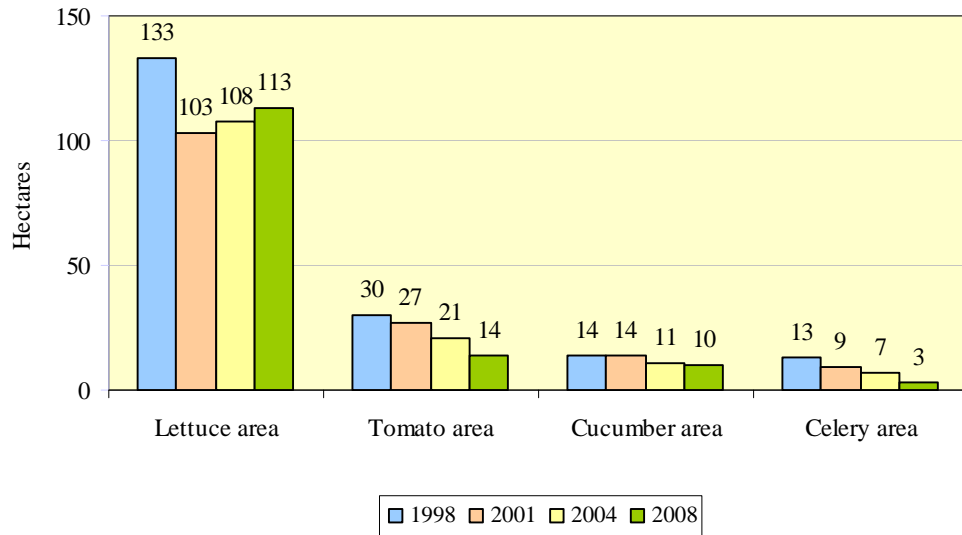


Chart 14 shows that total production area for protected vegetables is 166 hectares in 2008. This is a 14% decrease since the previous census (192 hectares in 2004).

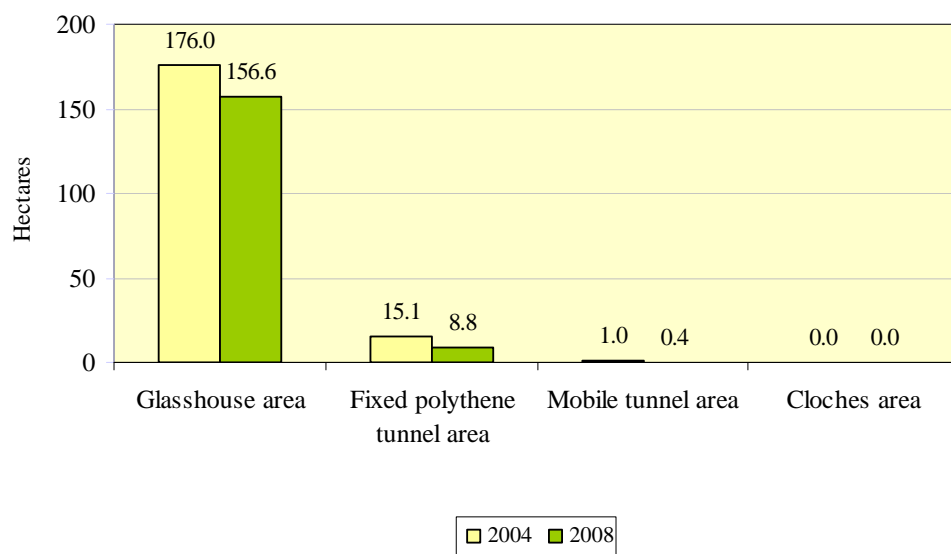
Protected lettuce accounts for over two-thirds (68%) of protected vegetable production area, with 113 hectares grown in 2008. As shown in Chart 15, the production area for protected lettuce has increased marginally over the last three censuses, though it is still below its 1998 level.

The production area for tomatoes has halved since 1998 (from 30 hectares to 14 hectares in 2008). However, as shown in Charts 21 and 22, production value of tomatoes has increased.

The production area for protected herbs, cucumbers and celery are all down on the 2004 figures, while pepper production area has increased.

Dublin is by far the most important county for production of protected vegetables with 135 hectares (i.e. Dublin accounts for 81% of protected vegetable production area).

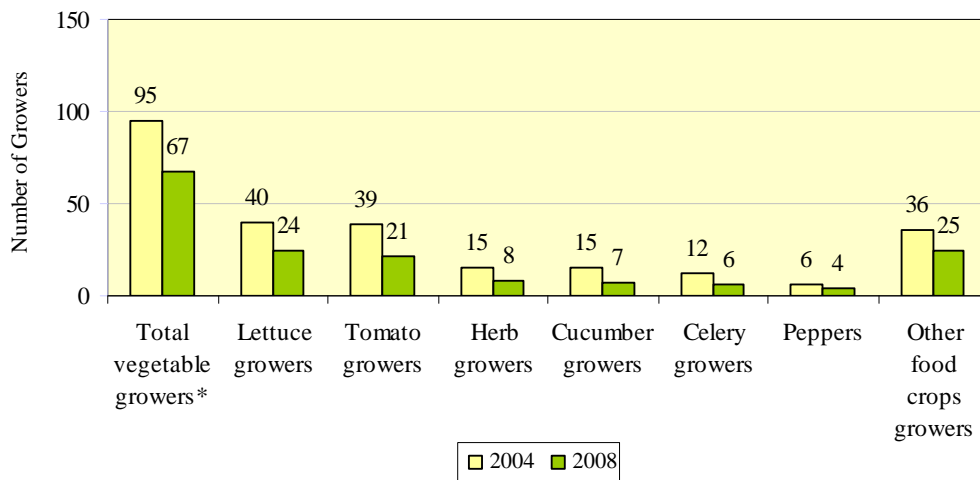
Chart 16: Production Area (Hectares) of Protected Vegetables 2004 & 2008 by Protected Structure Type



Protected vegetable production is predominantly under glass, rather than polythene. Of the total production area of 166 hectares, 157 hectares (95%) is under glass.

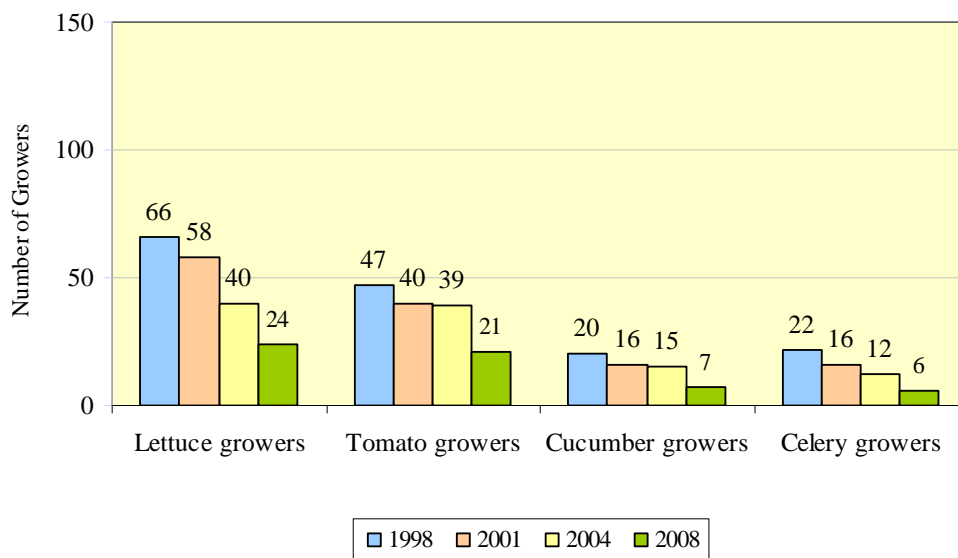
Protected vegetable production area under glass is down 11% since the last census (176 hectares in 2004).

Chart 17: Number of Growers of Protected Vegetables 2004 & 2008



*Less than the sum of all crops because some growers grow more than one crop type.

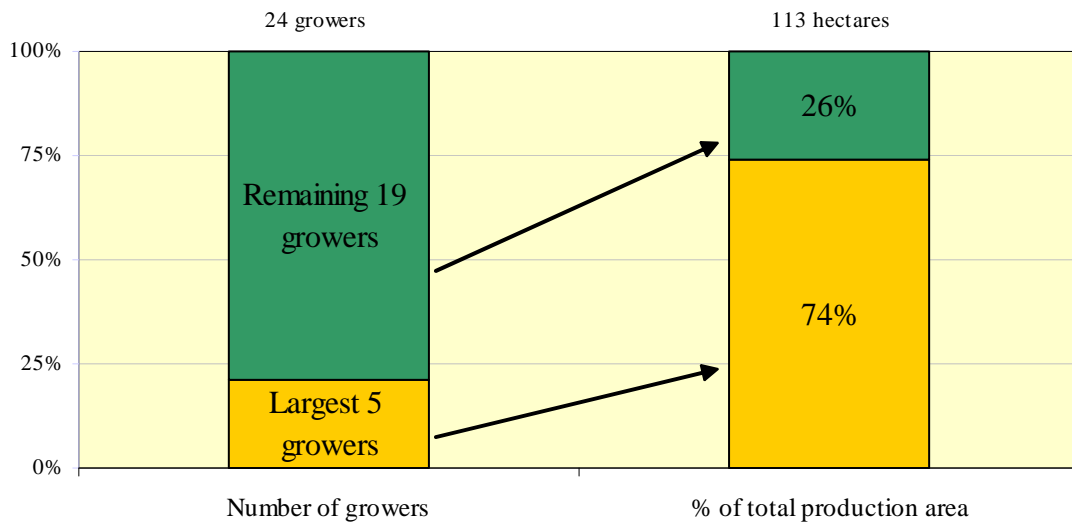
Chart 18: Number of Growers of Selected Protected Vegetables 1998, 2001, 2004 & 2008



As shown in Chart 17, there are 67 protected vegetable growers in 2008. This is a decrease of 29% since the last census (95 protected vegetable growers in 2004).

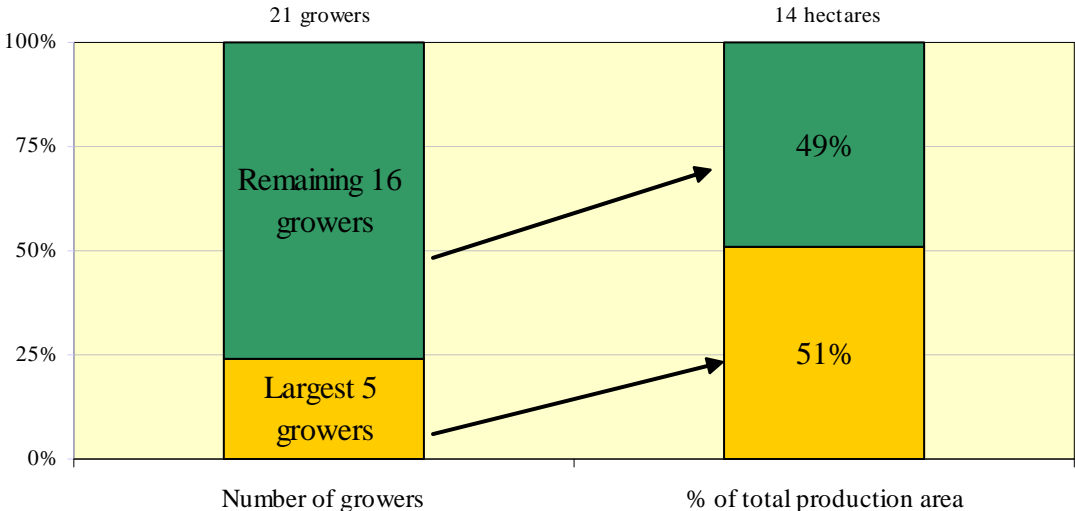
As shown in Chart 18, the number of growers involved in production of all the primary protected vegetable crops has fallen substantially since 1998. The number of protected lettuce growers has fallen from 66 in 1998 to 24 in 2008. Similarly, the number of protected tomato growers has fallen from 47 in 1998 to 21 in 2008. The number of cucumber and protected celery growers has also fallen.

Chart 19: Contribution of Largest Protected Lettuce Growers by Area in 2008



Protected lettuce production is dominated by larger growers. Although there are 24 protected lettuce growers in 2008, the 5 largest growers account for 74% of production area.

Chart 20: Contribution of Largest Protected Tomato Growers by Area in 2008



Protected tomato production is less dominated by larger growers than lettuce production. There are 21 protected tomato growers in 2008, of which the 5 largest account for 51% of production area.

Chart 21: Estimated Value (€millions) of Protected Vegetable Production 2004 & 2008

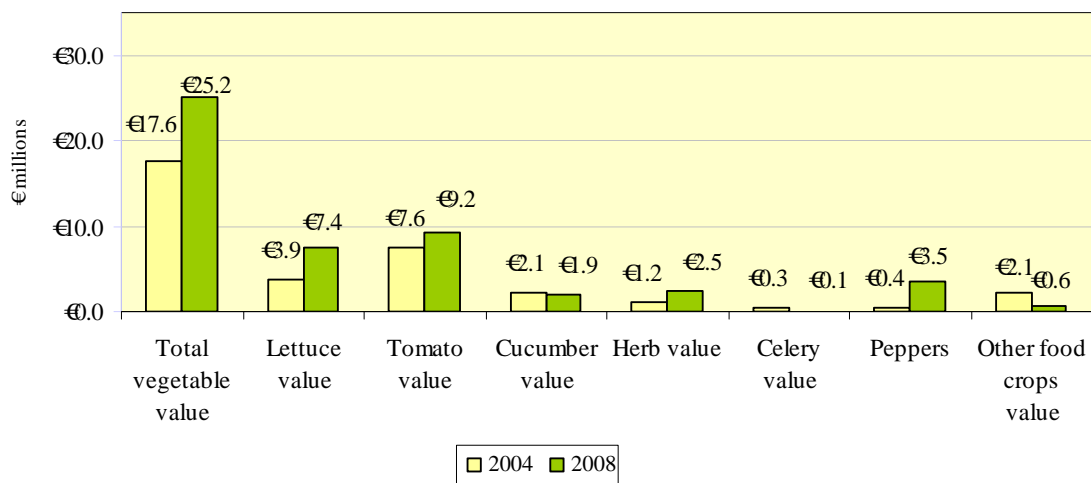


Chart 22: Estimated Value (€millions) of Selected Protected Vegetables 1998, 2001, 2004 & 2008

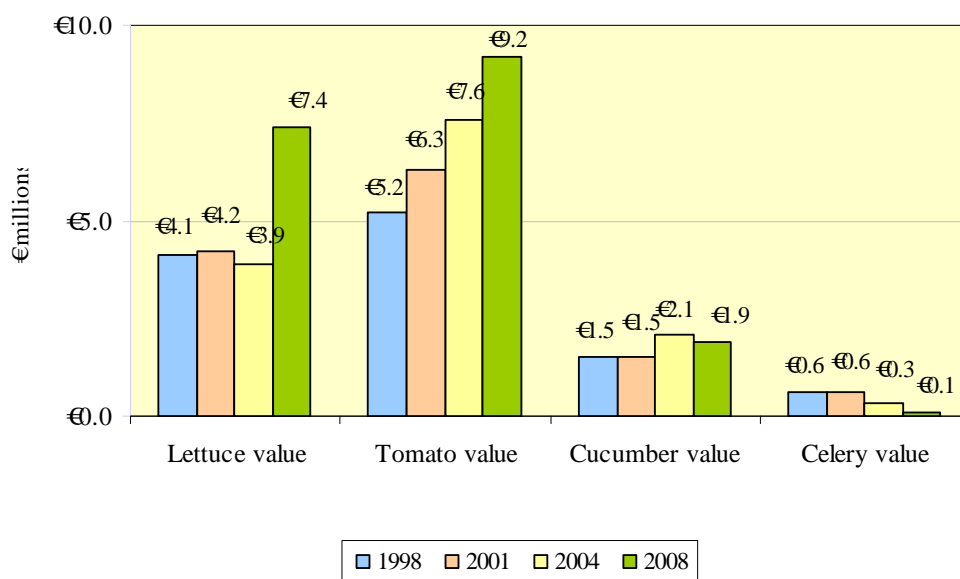


Chart 21 shows that, despite the fall in production area and number of growers, the value of protected vegetables has increased. The estimated value of protected vegetable production is €25.2 million in 2008, an increase of 43% since the last census (€17.6 million in 2004).

Chart 22 shows that the value of protected lettuce production showed little change between 1998 and 2004, before increasing in 2008. This increase is attributable to a move by some growers to production of higher value “continental” lettuce lines.

The value of protected tomato production has increased steadily since 1998. This is attributable to specialisation, more efficient production and higher value lines.

Section Four: Protected Amenity Plant Production

This section covers all amenity plants grown under protection. Comparisons are made with the 2004 census, and with the 1998 and 2001 Protected Crop censuses where appropriate.

The key trend seen in this section is that amenity plant production area has increased marginally (7%) since the last census but grower numbers have declined, attributable to a decline in the number of bedding plant growers.

Chart 23: Production Area (Hectares) of Protected Amenity Plants 2004 & 2008

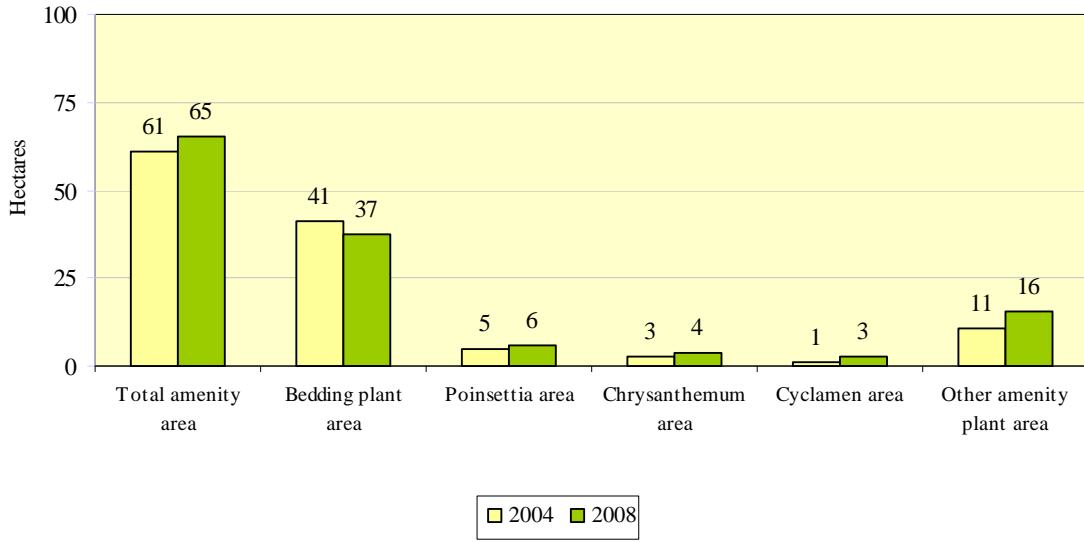


Chart 24: Production Area (Hectares) of Selected Protected Amenity Plants 1998, 2001, 2004 & 2008

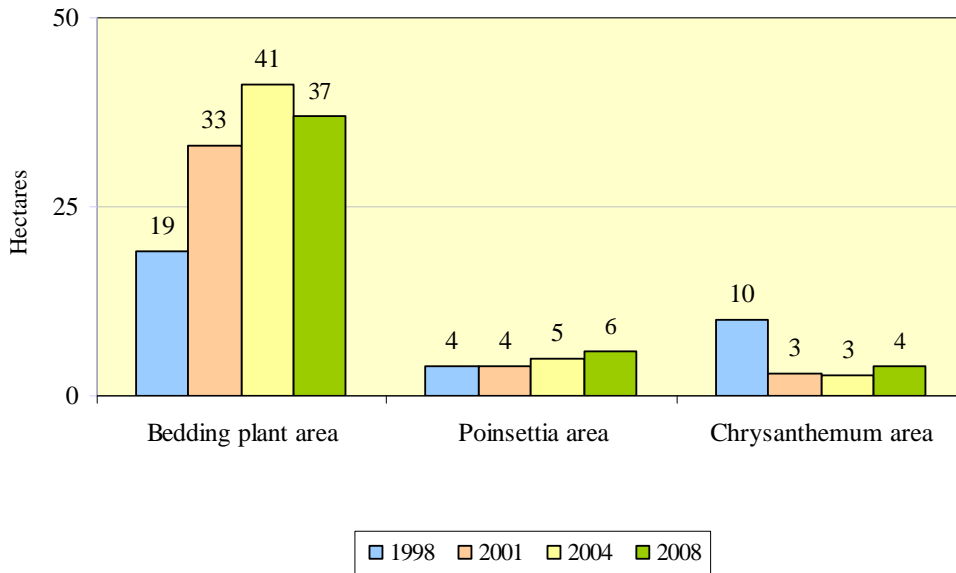


Chart 23 shows that the total production area for protected amenity plants in 2008 is 65 hectares. This is a 7% increase since the last census (61 hectares in 2004).

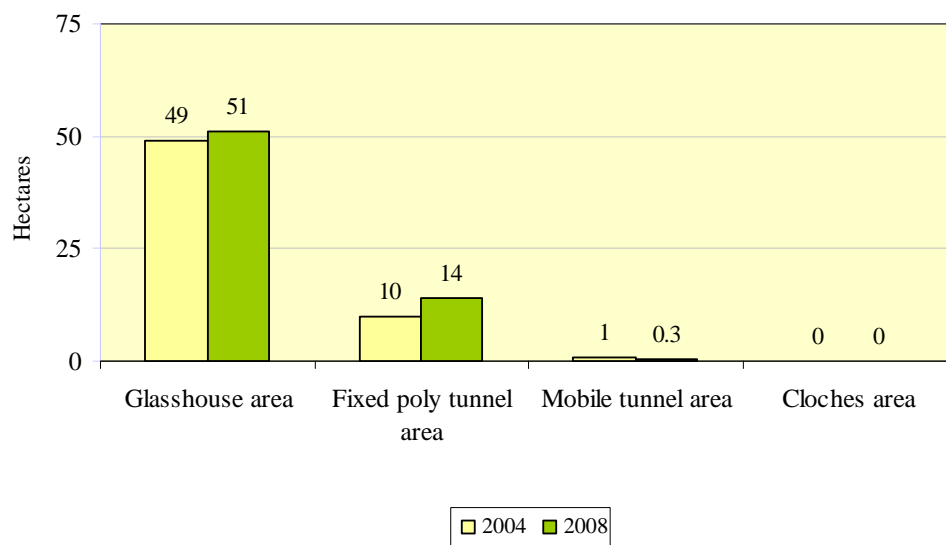
Bedding plants account for over half (57%) of protected amenity plant production area. As shown in Chart 24, the increased interest in bedding plants production seen between 1998 and 2004 appears to have waned. Bedding plant production area grew from 19 hectares in 1998 to 41 hectares in 2004, but had fallen marginally to 37 hectares in 2008.

The production area for poinsettias is virtually unchanged since 1998, while the production area for chrysanthemums has fallen.

As shown in Chart 23, there were small increases in the production area of 'other amenity plants' since 2004. The main plants in this category are geraniums (5.3 hectares), patio plants (3.4 hectares), primroses (2.1 hectares), basket plants (2 hectares) and bergonias (1.8 hectares).

The main counties for amenity plant production are Cork (24 hectares), Dublin (14 hectares) and Meath (10 hectares).

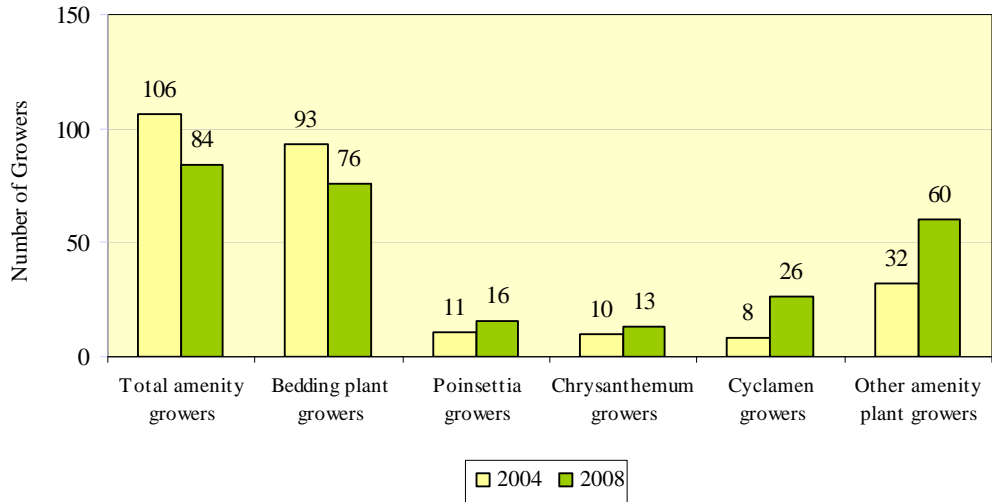
Chart 25: Production Area (Hectares) of Protected Amenity Plants 2004 & 2008 by Protected Structure Type



Amenity plant production is predominantly under glass, rather than polythene. Of the total production area of 65 hectares, 51 hectares (78%) is under glass.

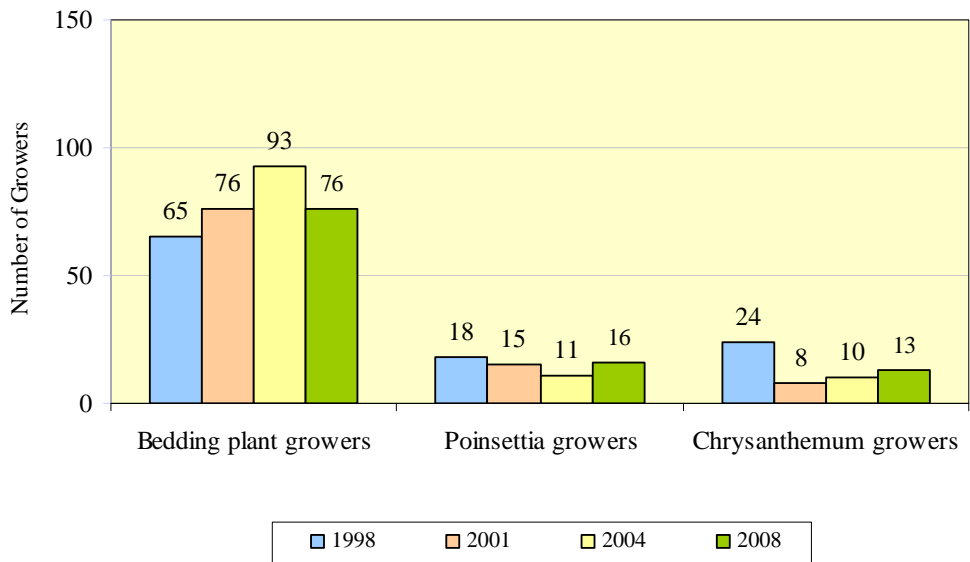
Amenity plant production area under glass is up marginally since 2004 (from 49 hectares to 51 hectares in 2008). Amenity plant production under fixed poly tunnels is up from 10 hectares in 2004 to 14 hectares in 2008.

Chart 26: Number of Growers of Protected Amenity Plants 2004 & 2008



*Less than the sum of all plants because some growers grow more than one plant type.

Chart 27: Number of Growers of Selected Protected Amenity Plants 1998, 2001, 2004 & 2008



As shown in Chart 26, there are 84 amenity plant growers in 2008. This is a decrease of 21% since the last census (106 amenity plant growers in 2004).

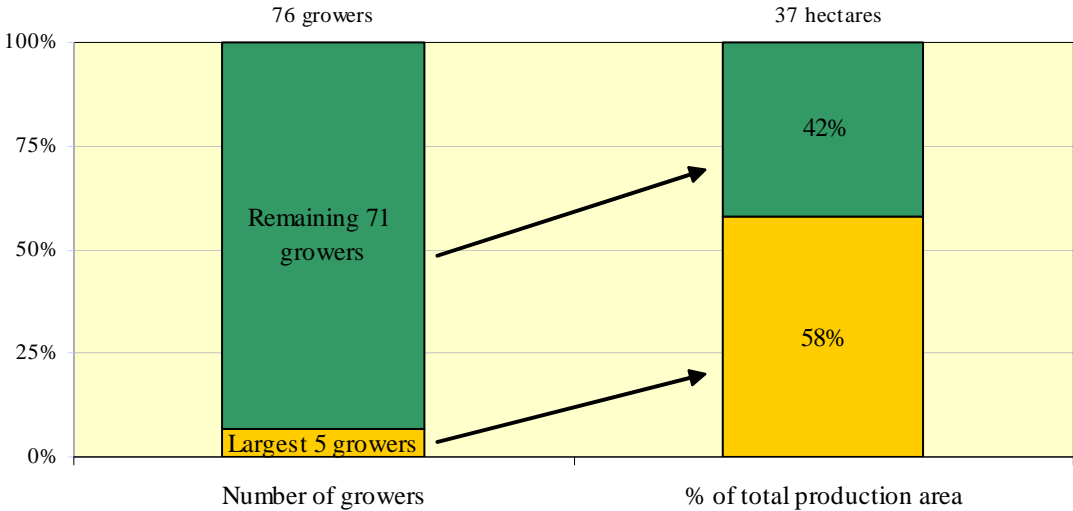
Chart 27 shows that bedding plant grower numbers increased between the 1998 and 2004 censuses, before falling in 2008.

Charts 27 also shows that poinsettia grower numbers fell between 1998 and 2004, before increasing in 2008. Chrysanthemum grower numbers fell between 1998 and 2001, and have since increased slowly.

As shown in Chart 26, the number of cyclamen growers has increased since 2004. This is due to a number of bedding plant growers diversifying to also produce cyclamens. Thus, while cyclamen grower numbers have increased significantly, the production area and value of output still remains relatively low (see Charts 23 and 29).

The number of growers of 'other amenity plants' has increased since 2004, reflecting the growth in production area and value of this category (see Charts 23 and 29).

Chart 28: Contribution of Largest Protected Bedding Plants Growers by Area in 2008



Protected bedding plants production is dominated by a small number of large-scale growers. Although there are 76 bedding plant growers, the 5 largest growers account for 58% of production area.

Chart 29: Estimated Value (€millions) of Protected Amenity Plant Production 2004 & 2008

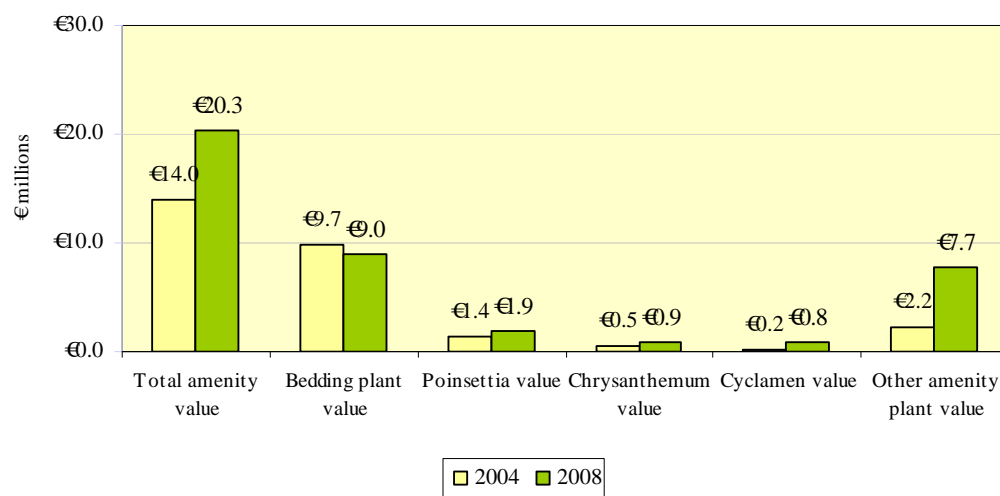
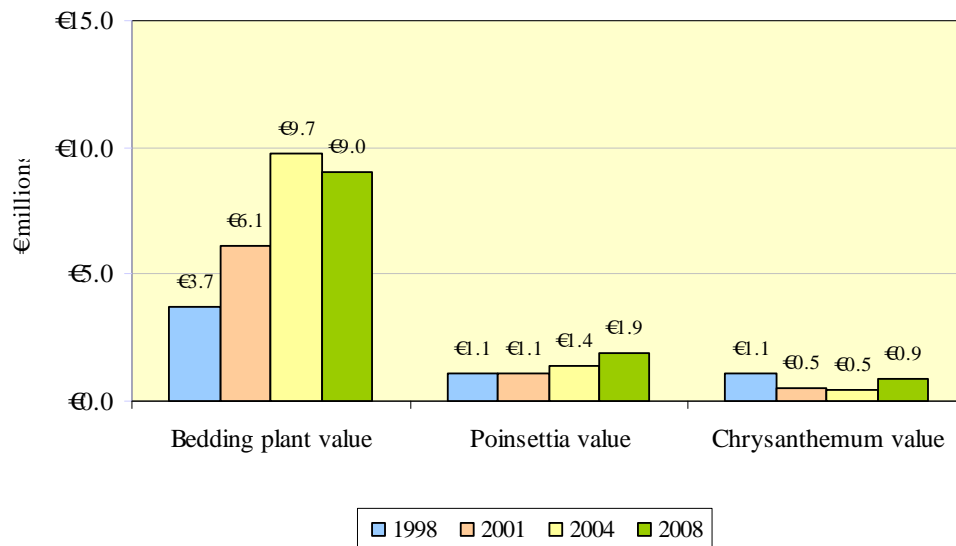


Chart 30: Estimated Value (€millions) of Selected Protected Amenity Plants 1998, 2001, 2004 & 2008



As shown in chart 29, the estimated value of amenity plant production in 2008 is €20.3 million. This is a 45% increase on the last census (€14 million in 2004).

Bedding plants account for 44% of amenity plant production value. As shown in Chart 30, the value of bedding plant production increased significantly between 1998 and 2004, before decreasing marginally in 2008 (€9.0 million in 2008).

Poinsettias and chrysanthemum production values show little change since 1998.

'Other amenity plants' have an estimated value of €7.7 million in 2008. Included in this category are geraniums (€2.9 million), patio plants (€2.8 million), begonias (€0.6 million), basket plants (€0.4 million) and primroses (€0.3 million).

Section Five: Protected Structure Area

This section shows the area, usage and location of glasshouses and polythene structures. For the purposes of this report, protected structures are defined as fixed polythene tunnels, mobile tunnels and cloches (low tunnels).

Area in this section differs to the 'production area' referred to in previous sections in that production area includes multiple plantings. For example, a grower may have one hectare of glasshouses in which 5 plantings of lettuce are grown. The glasshouse area would be 1 hectare and the production area would be 5 hectares.

The key trend seen in this section is the significant increase in protected structure area. This reflects the move from outdoor production to production under some form of protected structure, and investment by growers (for the most part supported by grant aid from the Department of Agriculture, Fisheries & Food).

Chart 31: Protected Structure Area (Hectares) 2004 & 2008

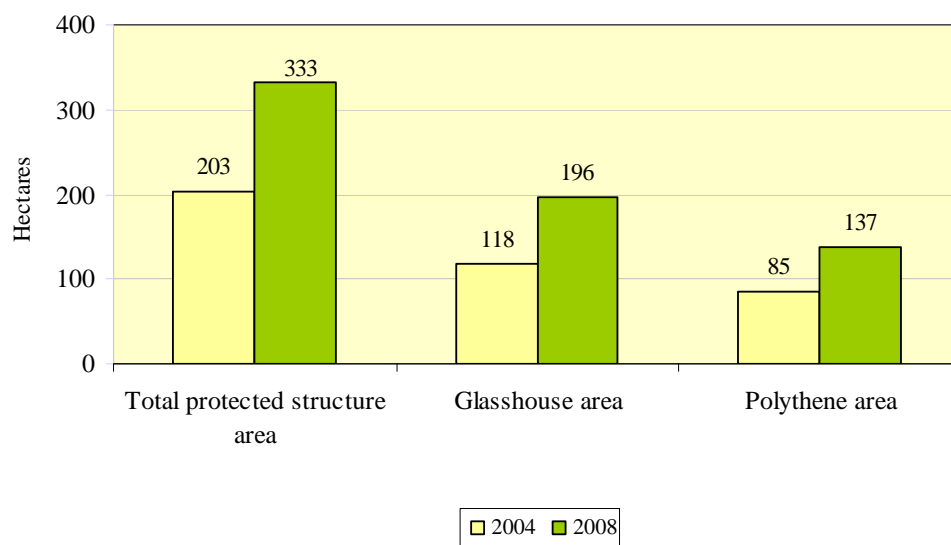
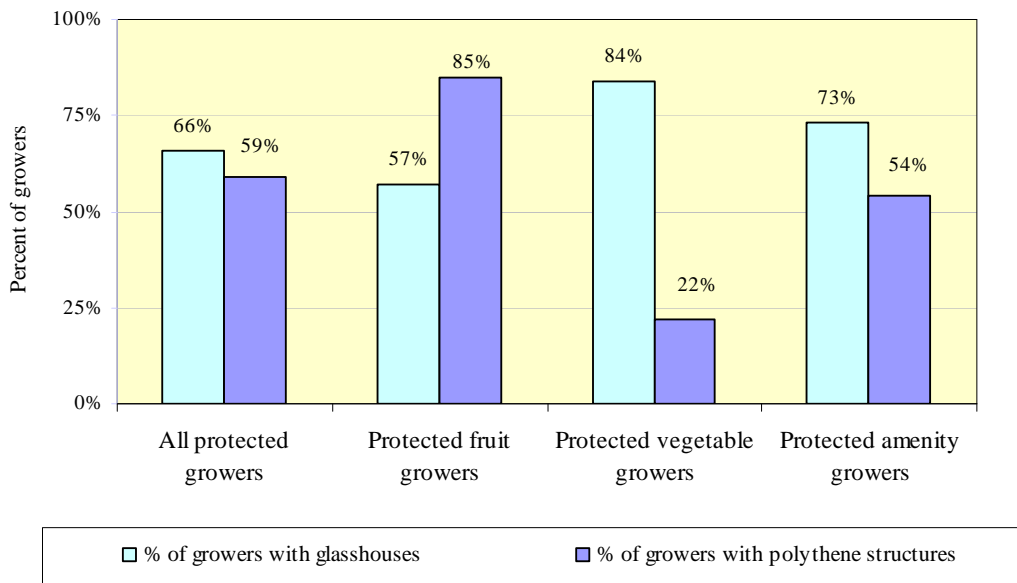


Chart 31 illustrates that the total protected structure area in 2008 is 333 hectares. Of this, 196 hectares (59%) are glasshouses and 137 hectares (41%) are polythene tunnels (fixed, mobile and cloches). Both glasshouse and polythene area has increased substantially since the last census (118 hectares of glasshouses and 85 hectares of polythene in 2004).

Dublin has by far the highest area of glasshouses. Dublin has 153 hectares of glasshouses, representing 78% of total glasshouse area.

Dublin and Wexford have the highest area of polythene tunnels. Dublin has 47 hectares of polythene (34% of total polythene area) and Wexford has 45 hectares (33% of polythene area).

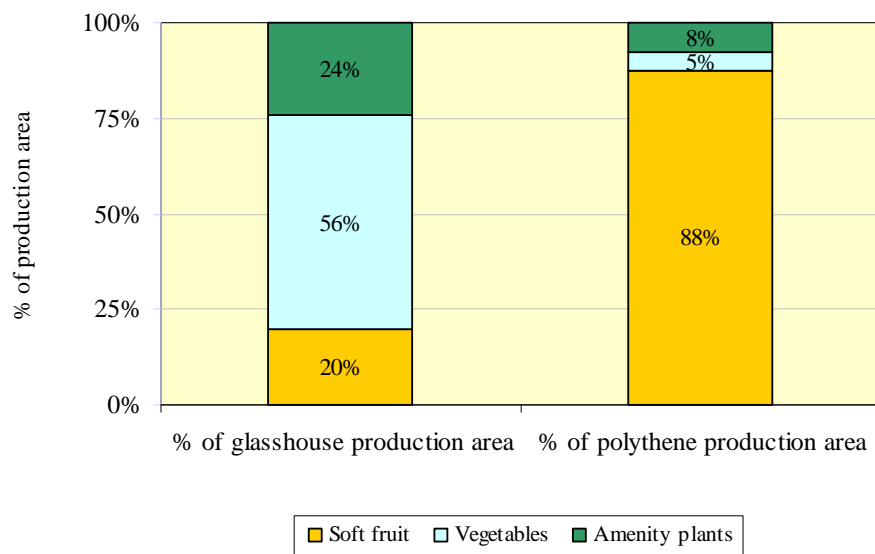
Chart 32: Percent of Growers with Protected Structures 2008



66% of all protected crop growers have glasshouses, while 59% have polythene structures.

Among protected fruit growers, 57% have glasshouses and 85% have polythene structures; among protected vegetable growers, 84% have glasshouses and 22% have polythene structures; and among amenity plant growers, 73% have glasshouses and 54% have polythene structures.

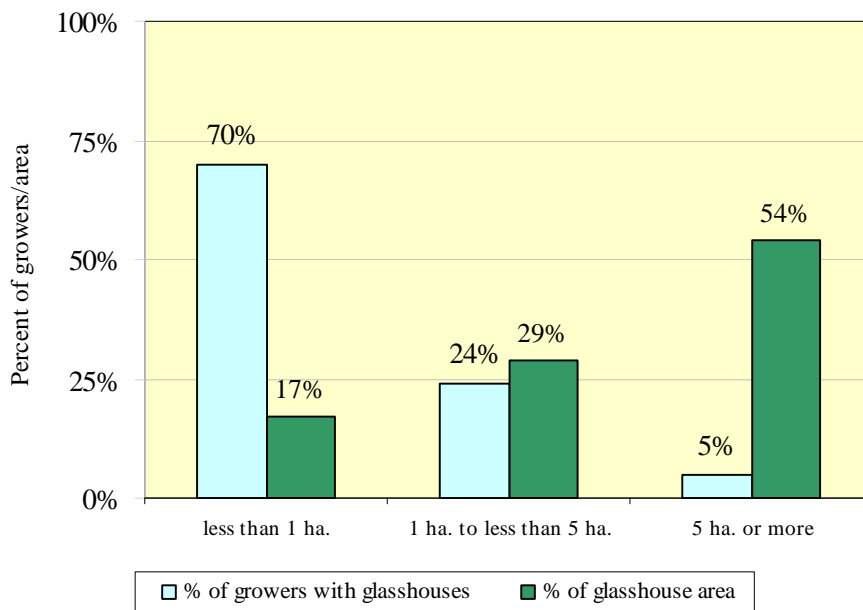
Chart 33: Protected Structure Usage 2008



Production under polythene structures is mostly soft fruit production. Of the total production area under polythene, 88% is for soft fruit (primarily strawberries).

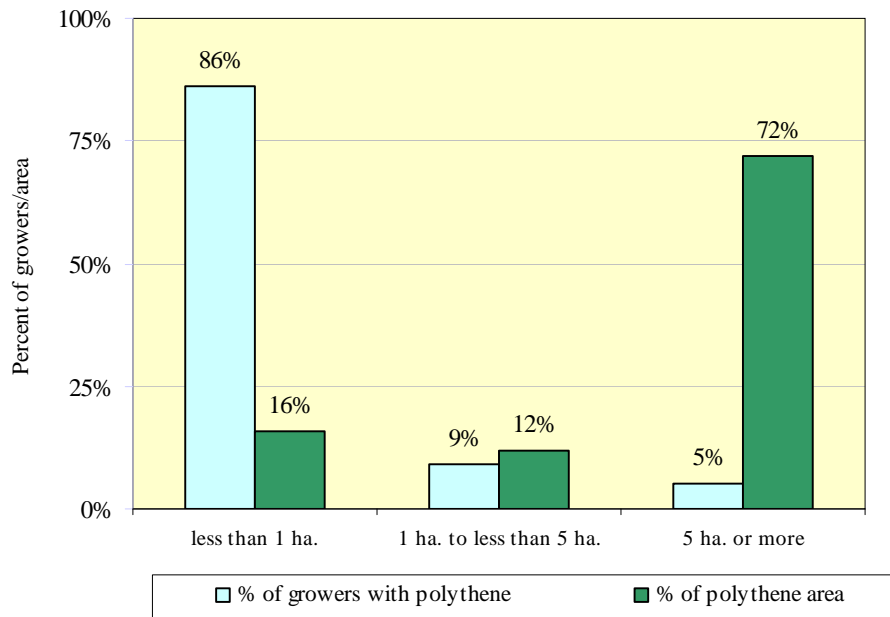
Production in glasshouses has a more balanced mix. Of the total production area under glasshouses, 56% is for vegetables, 24% for amenity plants and 20% for soft fruit.

Chart 34: Percent of Growers with Glasshouses 2008 by Holding Size



Larger growers account for most of the glasshouse area. Growers with 5 hectares or more of glasshouses account for only 5% of all growers with glasshouses, but account for 54% of the total glasshouse area.

Chart 35: Percent of Growers with Polythene Tunnels 2008 by Holding Size

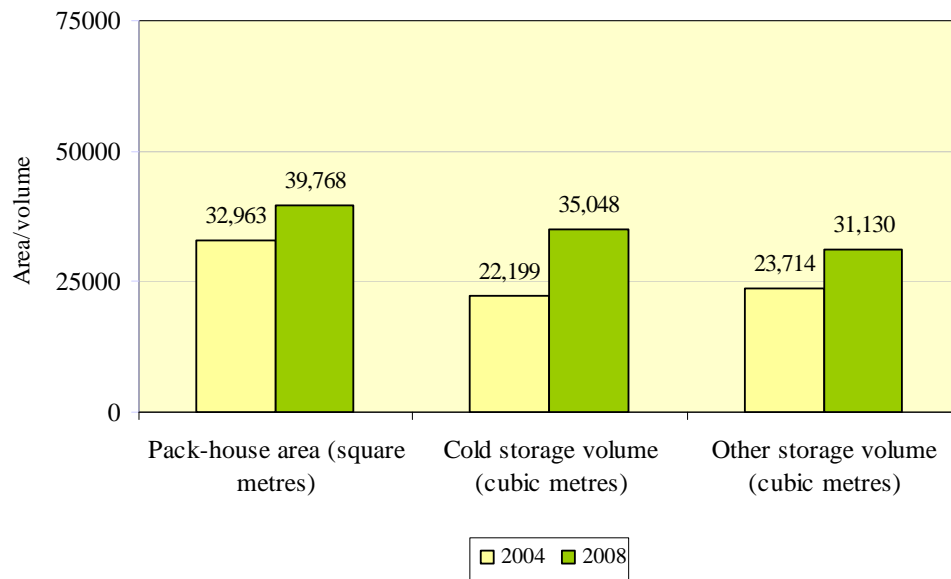


Larger growers also account for most of the polythene area. Growers with 5 hectares or more of polythene account for only 5% of all growers with polythene, but account for 72% of polythene area.

Section Six: Storage Facilities

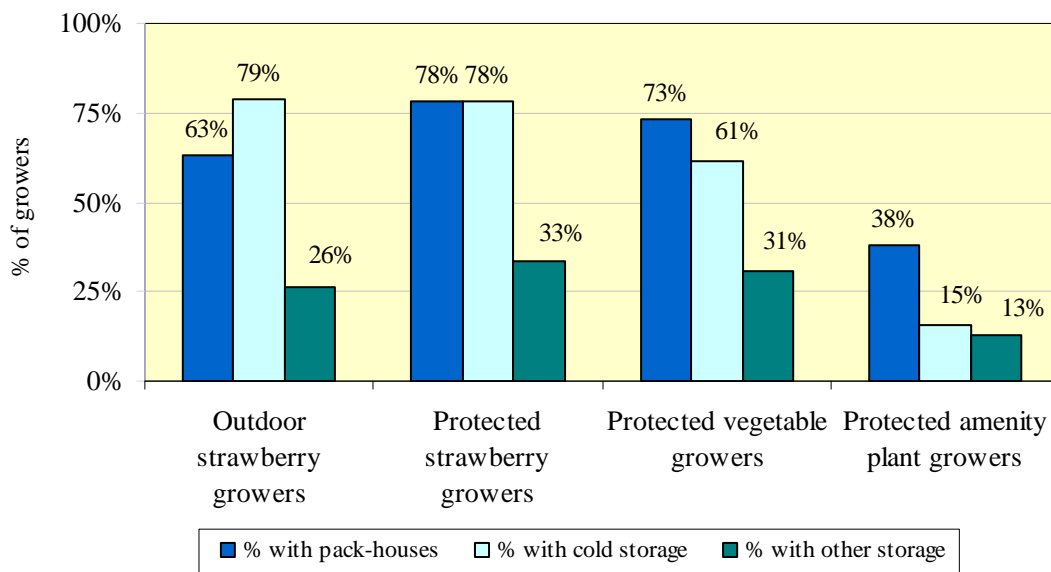
This section shows the area and volume of storage facilities among soft fruit and protected crop growers. The key trend is an increase in pack-house area and cold storage volume, reflecting grower investment and grant support provided by the Department of Agriculture, Fisheries & Food.

Chart 36: Total Storage Facility Area/Volume 2004 & 2008



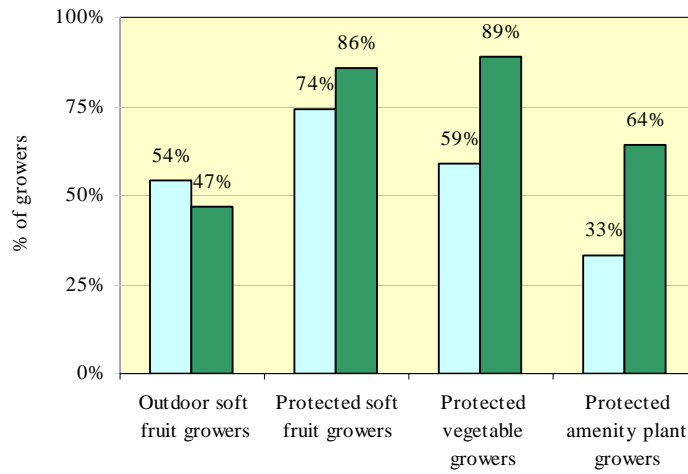
Storage facilities have increased since the last census. Pack-house area is 39,768 square metres in 2008, up from 32,963 square metres in 2004. Cold storage volume was 35,048 cubic metres in 2008, up from 22,199 cubic metres in 2004.

Chart 37: Percent of Growers with Storage Facilities 2008



Food-related crop growers are more likely to have pack-houses, cold storage and other storage facilities than are amenity growers.

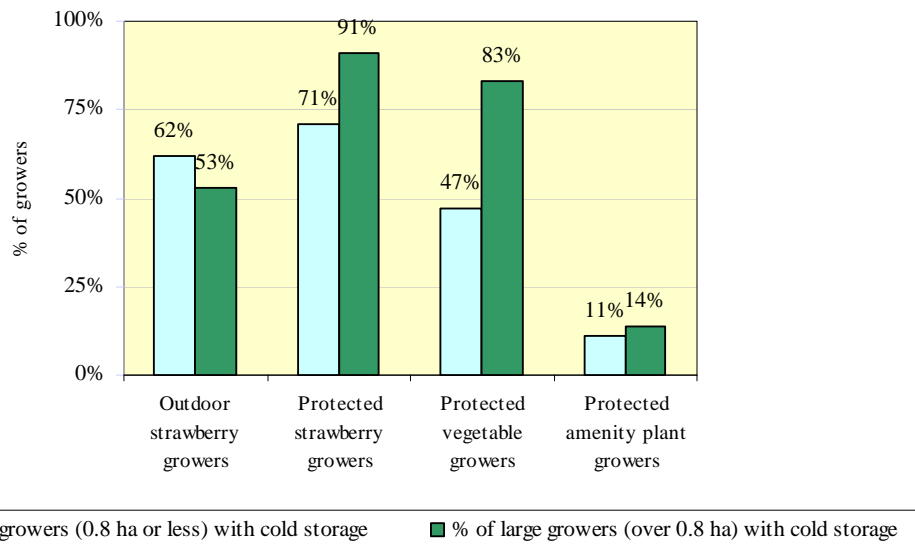
Chart 38: Percent of Growers with Pack-Houses 2008 by Size of Grower



□ % of small growers (0.8 ha or less) with pack-houses ■ % of large growers (over 0.8 ha) with pack-houses

With the exception of outdoor soft fruit growers, larger growers tend to have pack-houses more than smaller growers.

Chart 39: Percent of Growers with Cold Storage 2008 by Size of Grower



With the exception of outdoor strawberry growers, larger growers also tend to have cold storage facilities more than smaller growers.

Section 7 Appendix Tables

Appendix One: Production Area, Grower Numbers and Value

Table 1.1

Outdoor Soft Fruit Production (for Fresh market, excludes processing market) 1999, 2004 and 2008

	1999		2004			2008		
	Hectares	Growers	Hectares	Growers	Estimated Value (€millions)	Hectares	Growers	Estimated Value (€millions)
Outdoor Strawberries	111	88	53.9	36	2.5	28.1	19	1.5
Outdoor Raspberries	44	49	30.3	28	1.3	7	12	0.2
Outdoor Blueberries	13	5	7	3	0.16		2	
Outdoor Blackcurrants***	11	16	3.4	10	0.02	0.34	3	0.01
Outdoor Blackberries	4	8	3	9	0.03	3.1	4	0.1
Outdoor Gooseberries	6	20	3.3	12	0.03	0.8	5	0.02
Outdoor Tayberries	4	14	3.8	9	0.05	-	-	-
Other Outdoor Fruits	7	*	2.5	4	0.01		1	
Total Outdoor Fruits**	201	108	107.2	48	4.1	49.1	23	1.8

* Data not available

** Grower totals may be less than the sum of all categories because some growers are in more than one category.

*** A significant proportion of outdoor blackcurrants are sold for processing, but are excluded from these figures.

Some figures withheld to protect grower confidentiality (only a small number of growers in category).

Value figures for 1999 not available.

Table 1.2

Protected Fruit, Vegetable and Amenity Plant Production 1998, 2001, 2004 and 2008

	1998			2001			2004			2008		
	Hectares	Growers	Estimated Value (€millions)	Hectares	Growers	Estimated Value (€millions)	Hectares	Growers	Estimated Value (€millions)	Hectares	Growers	Estimated Value (€millions)
Protected Strawberries	16	33	*	46	37	*	127.2	65	19.21	195.9	51	25.07
Protected Raspberries	*	*	*	*	*	*		8		9.6	10	1.01
Other Protected Fruit	*	*	*	*	*	*		2		3.3	7	0.175
Total Protected Soft Fruit**	*	*	*	*	*	*	132.0	65	19.6	208.8	53	26.3
Protected Tomatoes	30	47	5.2	27	40	6.3	20.4	39	7.58	14.4	21	9.2
Protected Lettuce	133	66	4.1	103	58	4.2	108.4	40	3.85	113.4	24	7.38
Protected Cucumbers	14	20	1.5	14	16	1.5	11.1	15	2.12	9.6	7	1.95
Protected Herbs	*	*	*	*	*	*	11.9	15	1.21	6.5	8	2.5
Protected Celery	13	22	0.6	9	16	0.6	6.6	12	0.35	2.7	6	0.1
Protected Peppers	*	*	*		2		1.4	6	0.35	6.1	4	3.5
Other Protected Vegetables	*	*	*	*	*	*	32.3	36	2.14	13.2058	25	0.58
Total Protected Vegetables**	*	*	*	*	*	*	192.1	95	17.6	165.9	67	25.2
Protected Bedding Plants	19	65	3.7	33	76	6.1	41.1	93	9.75	37.3	76	9.0
Protected Chrysanthemums	10	24	1.1	3	8	0.5	2.6	10	0.46	3.8	13	0.9
Protected Poinsettias	4	18	1.1	4	15	1.1	5.0	11	1.4	6.0	16	1.9
Protected Cyclamen	0.2	11	0.4	0.4	7	0.1	1.1	8	0.25	2.8	26	0.8
Other Protected Amenity Plants	34	57	3	21	43	4.2	10.9	32	2.19	15.5	60	7.7
Total Protected Amenity Plants**	67	175	9.3	61	149	12	60.6	106	14.05	65.4	84	20.3

* Data not available

** Grower totals may be less than the sum of all categories because some growers are in more than one category. Some figures withheld to protect grower confidentiality (only a small number of growers in category).

Table 1.3

Production Area of Soft Fruit and Protected Crops 2008 (hectares) by County

	Outdoor Fruit	Protected Fruit	Protected Vegetables	Protected Amenity Plants	Total	Outdoor Fruit	Protected Fruit	Protected Vegetables	Protected Amenity Plants	Total **	Outdoor Fruit	Protected Fruit	Protected Vegetables	Protected Amenity Plants	Total
	Hectares	Hectares	Hectares	Hectares	Hectares	Growers	Growers	Growers	Growers	Growers	Estimated Value €	Estimated Value €	Estimated Value €	Estimated Value €	Estimated Value €
Carlow	*	*	-	0.3	*	1	1	-	3	6	*	*	-	120,500	*
Cavan	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Clare	-	*	*	*	*	-	1	1	1	1	-	*	*	*	*
Cork	*	2.3	*	24.2	*	2	4	2	8	16	*	300,300	*	6,250,690	*
Donegal	-	-	-	0.3	0.3	-	-	-	3	3	-	-	-	209,600	209,600
Dublin	*	70.9	134.6	13.8	*	1	8	43	11	59	*	14,629,610	19,163,214	4,284,500	*
Galway	-	-	*	2.3	*	-	-	2	4	7	-	-	*	216,600	*
Kerry	-	*	*	1.3	*	-	1	1	3	5	-	*	*	471,400	*
Kildare	*	*	-	*	*	1	1	-	2	3	*	*	-	*	*
Kilkenny	*	*	-	*	*	2	2	-	2	6	*	*	-	*	*
Laois	1.0	*	-	-	*	3	2	-	-	3	48,150	*	-	-	*
Leitrim	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Limerick	-	-	-	0.7	0.7	-	-	-	5	5	-	-	-	244,925	244,925
Longford	-	-	-	*	*	-	-	-	1	1	-	-	-	*	*
Louth	-	19.7	*	2.8	*	-	3	2	11	16	-	2,224,808	*	2,764,408	*
Mayo	-	-	-	*	*	-	-	-	1	1	-	-	-	*	*
Meath	-	15.3	2.0	10.3	27.6	-	12	3	12	26	-	3,463,113	861,369	2,665,202	6,989,684
Monaghan	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Offaly	*	*	-	-	*	2	1	-	-	3	*	*	-	-	*
Roscommon	-	-	*	*	*	-	-	1	1	1	-	-	*	*	*
Sligo	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Tipperary	*	*	-	-	*	1	1	-	-	1	*	*	-	-	*
Waterford	*	*	*	*	*	1	1	1	2	3	*	*	*	*	*
Westmeath	-	-	-	*	*	-	-	-	1	1	-	-	-	*	*
Wexford	128.4	79.2	5.8	3.7	217.1	14	14	5	7	35	1,343,715	3,600,251	1,569,770	1,112,385	7,626,121
Wicklow	*	*	2.2	2.7	*	2	1	6	6	14	*	*	1,085,203	1,191,350	*
Total	158	209	166	65	598	30	53	67	84	214	2,394,808	26,267,673	25,231,126	20,293,294	74,186,901

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

** Grower totals may be less than the sum of all categories because some growers are in more than one category.

Table 1.4**Average Production Area of Soft Fruit and Protected Crops 2004 & 2008 (hectares) by Sector**

	2004	2008
	Hectares (Average)*	Hectares (Average)*
Outdoor fruit	3.0	5.3
Protected fruit	2.0	3.9
Protected vegetables	2.0	2.5
Protected amenity plants	0.6	0.8
Average of all sectors	2.1	2.6

* This table refers to production area and, due to multiple plantings, can be higher than holding size/protected structure area.

Table 1.5**Average Production Area of Soft Fruit and Protected Crops 2008 (hectares) by County**

	Hectares (Average)
Carlow	*
Cavan	-
Clare	*
Cork	0.9
Donegal	-
Dublin	4.1
Galway	*
Kerry	*
Kildare	*
Kilkenny	2.7
Laois	1.4
Leitrim	-
Limerick	-
Longford	-
Louth	7.1
Mayo	-
Meath	1.2
Monaghan	-
Offaly	*
Roscommon	*
Sligo	-
Tipperary	*
Waterford	*
Westmeath	*
Wexford	7.1
Wicklow	0.5

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

Table 1.6

Production Area of Soft Fruit and Protected Crops 2008 (hectares) by Holding Size

2008				
	Outdoor Fruit	Protected Fruit	Protected Vegetables	Protected Amenity Plants
	Hectares	Hectares	Hectares	Hectares
Less than 0.2 Ha.	0	1	0	3
0.2 to 0.4 Ha.	1	2	2	6
over 0.4 to 0.8 Ha.	4	5	9	10
Greater than 0.8 Ha.	152	201	116	47
Total	158	209	128	65

Table 1.7

Number of Growers of Soft Fruit and Protected Crops 2008 by Holding Size

2008				
	Outdoor Fruit	Protected Fruit	Protected Vegetables	Protected Amenity Plants
	No. of Growers	No. of Growers	No. of Growers	No. of Growers
Less than 0.2 Ha.	3	16	6	33
0.2 to 0.4 Ha.	4	7	9	20
over 0.4 to 0.8 Ha.	6	8	17	17
Greater than 0.8 Ha.	17	22	36	14
Total	30	53	68	84

Table 1.8

Estimated Value of Soft Fruit and Protected Crops 2008 by Holding Size

2008				
	Outdoor Fruit	Protected Fruit	Protected Vegetables	Protected Amenity Plants
	Estimated Value (€)	Estimated Value (€)	Estimated Value (€)	Estimated Value (€)
Less than 0.2 Ha.	20,250	197,944	68,131	1,222,277
0.2 to 0.4 Ha.	28,548	240,959	943,835	2,265,944
over 0.4 to 0.8 Ha.	130,300	552,670	1,715,394	3,449,215
Greater than 0.8 Ha.	2,215,710	25,276,100	23,061,502	13,355,858
Total	2,394,808	26,267,673	25,788,862	20,293,294

Appendix Two: Crop Types

Table 2.1

Details of Outdoor Fruit Crop Production 2004 (Fresh, Processing & Organic combined)

2004				
	Total Hectares	Estimated Value (€)	Estimated Value per Hectare €	Total Growers
Outdoor Strawberries	57.5	2,616,000	45,461	40
Outdoor Raspberries	30.3	1,323,000	43,617	29
Outdoor Blackcurrants	61.6	696,000	11,304	16
Outdoor Blueberries	9.0	519,939	57,598	4
Outdoor Tayberries	3.8	152,535	40,279	10
Outdoor Gooseberries	3.6	91,348	25,523	13
Outdoor Blackberries	3.1	89,727	28,494	10
Other Outdoor Fruits	2.9	57,452	19,675	5
Total Outdoor Fruits*	172	5,546,001	32,261	58

* Grower totals may be less than the sum of all categories because some growers are in more than one category.

Table 2.1 (continued)

Details of Outdoor Fruit Crop Production 2008 (Fresh, Processing & Organic combined)

2008				
	Total Hectares	Estimated Value (€)	Estimated Value per Hectare €	Total Growers
Outdoor Strawberries	28.1	1,446,018	51,460	19
Outdoor Raspberries	7.0	206,700	29,529	12
Outdoor Blackcurrants	108.6	535,140	4,926	10
Outdoor Blueberries	*	*	*	2
Outdoor Tayberries	-	-	-	-
Outdoor Gooseberries	1.2	20,950	17,754	5
Outdoor Blackberries	3.1	95,000	30,449	4
Other Outdoor Fruits	*	*	*	2
Total Outdoor Fruits**	158	2,394,808	15,157	30

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

** Grower totals may be less than the sum of all categories because some growers are in more than one category.

Table 2.2

Details of Protected Fruit Production 2004 (hectares, number of growers and value)

2004												
	Glasshouse	Fixed Poly Tunnels	Mobile Tunnels	Cloches/low Tunnels	Total	Glasshouse	Fixed Poly Tunnels	Mobile Tunnels	Cloches/low Tunnels	Total**	Estimated Value	Estimated Value per Hectare
	Hectares	Hectares	Hectares	Hectares	Hectares	Growers	Growers	Growers	Growers	Growers	€	€
Protected Strawberries (early season)	18.4	22.5	19.7			17	28	11	5	49	11,143,144	164,630
Protected Strawberries (mid season)		2.1	11.0	11.0		2	8	9	11	28	3,020,980	122,610
Protected Strawberries (late season)	4.5	7.6	17.0			12	19	8	2	33	5,045,876	144,631
Protected Raspberries		2.9	1.0	-		2	4	3	-	8		
Other Protected Fruits		-	-	-		2	-	-	-	2		
Total Protected Fruits	24	35	49	24	132	19	36	20	16	65	19,581,626	148,377

Some figures withheld to protect grower confidentiality (only a small number of growers in category).

** May be less than the sum of all categories because some growers are in more than one category.

Table 2.2 (continued)

Details of Protected Fruit Production 2008 (hectares, number of growers and value)

2008												
	Glasshouse	Fixed Poly Tunnels	Mobile Tunnels	Cloches/low Tunnels	Total	Glasshouse	Fixed Poly Tunnels	Mobile Tunnels	Cloches/low Tunnels	Total**	Estimated Value	Estimated Value per Hectare
	Hectares	Hectares	Hectares	Hectares	Hectares	Growers	Growers	Growers	Growers	Growers	€	€
Protected Strawberries (early season)	12.6	5.9	13.4	21.0	53.0	16	22	8	8	43	6,749,450	127,413
Protected Strawberries (mid season)	13.4	49.2	10.3	24.0	96.9	5	20	9	8	35	15,088,969	155,659
Protected Strawberries (late season)	7.3	4.4	14.8	19.5	46.0	12	16	8	5	29	3,248,554	70,598
Total Protected Strawberries	33.3	59.6	38.6	64.5	195.9	17	34	12	10	51	25,086,973	128,044
Protected Raspberries	6.4	0.3	2.9	-	9.6	4	3	4	-	10	1,005,470	104,444
Other Protected Fruits		0.4		-	3.3	2	3	2	-	7	175,230	53,261
Total Protected Fruits		60		64	209	18	35	13	10	53	26,267,673	125,778

Some figures withheld to protect grower confidentiality (only a small number of growers in category).

** May be less than the sum of all categories because some growers are in more than one category.

Table 2.3

Details of Protected Vegetable Production 2004 (hectares, number of growers and value)

2004												
	Glasshouse	Fixed Poly Tunnels	Mobile Tunnels	Cloches/low Tunnels	Total	Glasshouse	Fixed Poly Tunnels	Mobile Tunnels	Cloches/low Tunnels	Total*	Estimated Value	Estimated Value per Hectare
	Hectares	Hectares	Hectares	Hectares	Hectares	Growers	Growers	Growers	Growers	Growers	€	€
Tomatoes standard	16.6	0.6		-		28	7	2	-	36	5,772,736	335,332
Tomatoes vine			-	-		4	1	-	-	5	619,000	562,727
Tomatoes cherry				-	2.2	4	2	1	-	7	1,190,436	541,107
Lettuce butterhead	89.7	2.0		-		29	6	2	-	36	3,149,250	34,237
Lettuce continental	15.6	0.3	0.5	-	16.4	9	3	3	-	14	701,200	42,834
Peppers		0.4	-	-		2	4	-	-	6	354,000	257,455
Cucumbers	11.0	0.1		-		11	4	1	-	15	2,120,561	191,041
Celery	6.5		-	-		11	1	-	-	12	348,100	52,742
Herbs	10.3	1.6		-		6	7	2	-	15	1,212,960	101,929
Other food crops	22.2	9.9				26	8	2	-	36	2,144,400	66,804
Total Protected Vegetables	176.0	15.1	1.0	-	192.1	76	23	3	-	95	17,612,643	91,681

* May be less than the sum of all categories because some growers are in more than one category.

Some figures withheld to protect grower confidentiality (only a small number of growers in category).

Table 2.3 (continued)

Details of Protected Vegetable Production 2008 (hectares, number of growers and value)

2008												
	Glasshouse	Fixed Poly Tunnels	Mobile Tunnels	Cloches/low Tunnels	Total	Glasshouse	Fixed Poly Tunnels	Mobile Tunnels	Cloches/low Tunnels	Total*	Estimated Value	Estimated Value per Hectare
	Hectares	Hectares	Hectares	Hectares	Hectares	Growers	Growers	Growers	Growers	Growers	€	€
Tomatoes standard	7.9			-	8.1	12	1	1	-	14	3,254,580	404,296
Tomatoes vine	2.8		-	-		4	2	-	-	6	3,297,349	1,173,434
Tomatoes cherry				-		1	1	-	-	2		
Tomatoes plum	0.3	0.02	-	-	0.3	5	3	1	-	9		
Total Tomatoes		0.2		-	14.4	15	5	1		21	9,196,961	639,513
Lettuce butterhead	87.4		-	-		18	1	-	-	19	5,010,234	57,268
Lettuce continental	25.5	0.4	-	-		5	4	-	-	9	2,371,330	91,521
Total Lettuce	112.9		0.0	-		19	4	-	-	24	7,381,564	65,095
Peppers	6.1		-	-		3	1	-	-	4	3,512,100	573,357
Cucumbers	8.0			-	9.6	4	2	1	-	7	1,945,600	203,621
Celery	2.7	-	-	-	2.7	6	-	-	-	6	102,302	38,370
Herbs	4.3	2.2	-	-	6.5	3	5	-	-	8	2,514,500	385,955
Other food crops	8.8	4.4	-	-	13.2	21	11	-	-	25	578,099	43,764
Total Protected Vegetables	156.6	8.8		-	166	56	14	1	-	67	25,231,126	152,133

* May be less than the sum of all categories because some growers are in more than one category.

Some figures withheld to protect grower confidentiality (only a small number of growers in category).

Table 2.4

Details of Protected Amenity Plant Production 2004 (hectares, number of growers and value)

2004												
	Glasshouse	Fixed Poly Tunnels	Mobile Tunnels	Cloches/low Tunnels	Total	Glasshouse	Fixed Poly Tunnels	Mobile Tunnels	Cloches/low Tunnels	Total*	Estimated Value	Estimated Value per Hectare
	Hectares	Hectares	Hectares	Hectares	Hectares	Growers	Growers	Growers	Growers	Growers	€	€
Bedding plants	33.6	6.9	0.7	-	41.1	59	50	3	-	93	9,749,957	236,938
Chrysanthemums	2.0	0.6	-	-	2.6	7	4	-	-	10	462,000	178,654
Poinsettias	5.0	-	-	-	5.0	11	0	-	-	11	1,399,301	281,550
Cyclamen		-	-	-		8	0	-	-	8	248,925	
Other amenity plants	7.7	2.8		-		25	11	1	-	32	2,188,185	
Total Protected Amenity Plants	49	10		-	61	68	58	3	-	106	14,048,368	231,623

* May be less than the sum of all categories because some growers are in more than one category.

Some figures withheld to protect grower confidentiality (only a small number of growers in category).

Table 2.4 (continued)

Details of Protected Amenity Plant Production 2008 (hectares, number of growers and value)

2008												
	Glasshouse	Fixed Poly Tunnels	Mobile Tunnels	Cloches/low Tunnels	Total	Glasshouse	Fixed Poly Tunnels	Mobile Tunnels	Cloches/low Tunnels	Total*	Estimated Value	Estimated Value per Hectare
	Hectares	Hectares	Hectares	Hectares	Hectares	Growers	Growers	Growers	Growers	Growers	€	€
Bedding plants	28.3	8.6		-		49	36	1	-	76	8,962,858	240,577
Chrysanthemums	3.6	0.1	-	-	3.8	8	5	-	-	13	899,530	238,450
Poinsettias	5.9		-	-		14	2	-	-	16	1,908,900	315,203
Cyclamen	2.4	0.3	-	-	2.8	17	9	-	-	26	815,050	296,070
Other amenity plants	11.0	4.5	-	-	15.5	39	21	-	-	60	7,706,956	496,752
Total Protected Amenity Plants	51			-	65.4	61	44	1	-	84	20,293,294	310,524

* May be less than the sum of all categories because some growers are in more than one category.

Some figures withheld to protect grower confidentiality (only a small number of growers in category).

Appendix Three: Crops Types Grown by County

Table 3.1

Outdoor & Protected Soft Fruit Production 2008 by County

	Hectares			Growers			Estimated Total Value (€)		
	Strawberries	Raspberries	Minor Fruits**	Strawberries	Raspberries	Minor Fruits**	Strawberries	Raspberries	Minor Fruits**
Carlow	*	*	*	1	1	1	*	*	*
Cavan	-	-	-	-	-	-	-	-	-
Clare	*	-	-	1	-	-	*	-	-
Cork	3.5	*	*	6	2	1	421,300	*	*
Donegal	-	-	-	-	-	-	-	-	-
Dublin	62.8	7.0	2.9	8	4	3	13,657,010	868,300	136,300
Galway	-	-	-	-	-	-	-	-	-
Kerry	*	-	-	1	-	-	*	-	-
Kildare	*	-	-	1	-	-	*	-	-
Kilkenny	*	*	*	2	2	1	*	*	*
Laois	3.6	0.4	*	3	3	1	171,760	31,400	*
Leitrim	-	-	-	-	-	-	-	-	-
Limerick	-	-	-	-	-	-	-	-	-
Longford	-	-	-	-	-	-	-	-	-
Louth	19.7	-	-	3	-	-	2,224,808	-	-
Mayo	-	-	-	-	-	-	-	-	-
Meath	14.4	*	*	12	2	1	3,409,643	*	*
Monaghan	-	-	-	-	-	-	-	-	-
Offaly	*	-	*	1	-	1	*	-	*
Roscommon	-	-	-	-	-	-	-	-	-
Sligo	-	-	-	-	-	-	-	-	-
Tipperary	*	*	-	1	1	-	*	*	-
Waterford	*	-	-	2	-	-	*	-	-
Westmeath	-	-	-	-	-	-	-	-	-
Wexford	98.8	4.7	111.4	17	5	9	5,066,126	127,300	620,540
Wicklow	*	-	*	2	-	1	*	-	*
Total	224	17	126	61	20	19	26,531,491	1,212,170	909,320

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

** Minor fruits are blackcurrants, blueberries, blackberries, gooseberries, tayberries and other minor fruits.

Table 3.2

Protected Vegetables Production 2008 by County

	Hectares							Growers							Estimated Total Value (€)						
	Tomatoes	Lettuce	Cucumbers	Celery	Herbs	Peppers	Other Vegetables	Tomatoes	Lettuce	Cucumbers	Celery	Herbs	Peppers	Other Vegetables	Tomatoes	Lettuce	Cucumbers	Celery	Herbs	Peppers	Other Vegetables
Carlow	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Cavan	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Clare	-	-	-	-	*	-	-	-	-	-	-	1	-	-	-	-	-	-	*	-	-
Cork	-	-	-	*	-	-	*	-	-	-	1	-	-	2	-	-	-	*	-	-	*
Donegal	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Dublin	11.3	99.6	4.0	6.1	*	*	7.3	12	17	3	5	2	3	10	5,710,075	7,162,909	1,100,000	100,863	*	-	264,468
Galway	-	*	-	-	*	-	*	-	1	-	-	-	-	2	-	*	-	-	*	-	*
Kerry	-	-	-	-	-	-	*	-	-	-	-	-	-	1	-	-	-	-	-	-	*
Kildare	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Kilkenny	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Laois	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Leitrim	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Limerick	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Longford	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Louth	-	-	*	-	-	-	-	-	-	1	-	-	-	-	-	*	*	-	-	-	*
Mayo	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Meath	-	-	-	-	*	-	*	-	-	-	-	2	-	1	-	-	-	-	*	-	*
Monaghan	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Offaly	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Roscommon	*	-	-	-	-	-	*	1	-	-	-	-	-	1	*	-	-	-	-	-	*
Sligo	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Tipperary	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Waterford	*	*	-	-	-	-	*	1	1	-	-	-	-	1	*	*	-	-	-	-	*
Westmeath	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Wexford	*	*	*	*	*	-	2.4	2	1	1	-	-	-	3	*	*	*	*	*	-	67,505
Wicklow	0.6	0.1	*	-	0.6	*	0.9	5	4	2	-	3	1	4	120,748	22,430	*	-	820,500	-	109,925
Total	14	113	10	3	7	6	13	21	24	7	6	8	4	25	9,196,961	7,381,564	1,945,600	102,302	2,514,500	3,512,100	578,099

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

Table 3.3

Protected Amenity Plant Production 2008 by County

	Hectares				Growers				Estimated Total Value (€)			
	Bedding Plants	Chrysan themums	Poinsettias	Other Amenity Plants**	Bedding Plants	Chrysan themums	Poinsettias	Other Amenity Plants**	Bedding Plants	Chrysan themums	Poinsettias	Other Amenity Plants**
Carlow	0.3	-	-	*	3	-	-	1	99,000	-	-	*
Cavan	-	-	-	-	-	-	-	-	-	-	-	-
Clare	-	-	-	*	-	-	-	1	-	-	-	*
Cork	17.0	*	1.1	5.8	7	2	3	7	3,063,050	*	284,000	2,846,340
Donegal	0.3	-	-	*	3	-	-	2	197,500	-	-	*
Dublin	3.8	3.0	*	4.3	7	4	2	9	1,165,500	804,500	*	1,422,000
Galway	1.1	-	-	1.2	4	-	-	3	116,775	-	-	99,825
Kerry	*	-	-	0.3	2	-	-	3	*	-	-	143,700
Kildare	*	*	-	*	2	1	-	2	*	*	-	*
Kilkenny	*	-	-	*	2	-	-	1	*	-	-	*
Laois	-	-	-	-	-	-	-	-	-	-	-	-
Leitrim	-	-	-	-	-	-	-	-	-	-	-	-
Limerick	0.5	*	-	0.2	5	1	-	4	145,300	*	-	95,875
Longford	*	-	-	*	1	-	-	1	*	-	-	*
Louth	1.3	0.2	0.4	0.8	11	4	4	9	369,600	27,300	120,100	2,247,408
Mayo	*	-	-	*	1	-	-	1	*	-	-	*
Meath	5.8	-	1.5	3.0	12	-	4	9	1,225,053	-	481,600	958,550
Monaghan	-	-	-	-	-	-	-	-	-	-	-	-
Offaly	-	-	-	-	-	-	-	-	-	-	-	-
Roscommon	-	-	*	-	-	-	1	-	-	-	*	-
Sligo	-	-	-	-	-	-	-	-	-	-	-	-
Tipperary	-	-	-	-	-	-	-	-	-	-	-	-
Waterford	*	-	-	*	2	-	-	1	*	-	-	*
Westmeath	*	-	-	*	1	-	-	1	*	-	-	*
Wexford	2.0	*	*	1.6	7	1	1	4	691,260	*	*	400,125
Wicklow	2.5	-	*	*	6	-	1	2	1,048,350	-	*	*
Total	37	4	6	18	76	13	16	61	8,962,859	899,530	1,908,900	8,502,006

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

** Other amenity plants include cyclamen and other minor amenity plants.

Appendix Four: Protected Structure Area

Table 4.1

Protected Structure Area and Grower Numbers 2008 by County

	Area of Glass		Area of Polythene Structures (fixed tunnels, mobiles tunnels and cloches/low tunnels)	
	Hectares	Number of growers with glass	Hectares	Number of growers with polythene structures
Carlow	*	2	0.1	3
Cavan	-	-	-	-
Clare	*	1	*	2
Cork	5.4	5	5.3	12
Donegal	*	2	0.54	3
Dublin	153.1	58	46.6	8
Galway	3.0	5	0.20	3
Kerry	1.9	4	2.00	4
Kildare	1.7	3	*	2
Kilkenny	*	1	*	2
Laois	-	-	0.6	3
Leitrim	-	-	-	-
Limerick	*	2	0.8	5
Longford	*	1	*	1
Louth	7.7	7	11.7	13
Mayo	*	1	*	1
Meath	9.3	13	16.1	17
Monaghan	-	-	-	-
Offaly	-	-	*	1
Roscommon	*	2	*	2
Sligo	-	-	-	-
Tipperary	-	-	*	1
Waterford	2.0	4	3.1	4
Westmeath	-	-	-	-
Wexford	8.1	13	44.9	20
Wicklow	1.1	6	2.5	11
Total	196	129	137	118

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

Appendix Five: Employment

Table 5.1

Soft Fruit and Protected Crop Employment 2008

	Outdoor and Protected Soft Fruit	Protected Vegetables and Amenity Plants	Total
Full-time	126	536	662
Part-time (number of staff)	564	338	902
Part-time (full-time equivalent)	365	154	519
Pickers (not included in above figures)	329	n/a	329

Table 5.2

Soft Fruit and Protected Crop Employment 2008 by County

	Outdoor and Protected Soft Fruit				Protected Vegetables and Amenity Plants		
	Full-time	Part-time	Full-time Equivalent	Pickers	Full-time	Part-time	Full-time Equivalent
Carlow	*	*	*	-	*	*	*
Cavan	-	-	-	-	-	-	*
Clare	*	*	*	-	*	*	-
Cork	9	54	18	*	70	45	18
Donegal	-	-	-	-	11	10	*
Dublin	18	279	259	21	264	141	76
Galway	-	-	-	-	24	11	5
Kerry	*	*	*	-	8	12	4
Kildare	*	-	-	*	*	*	*
Kilkenny	*	*	*	-	*	*	*
Laois	*	*	*	*	-	-	-
Leitrim	-	-	-	-	-	-	-
Limerick	-	-	-	-	7	9	3
Longford	*	*	*	-	-	-	-
Louth	7	*	*	45	31	32	12
Mayo	-	-	-	-	*	*	*
Meath	10	33	15	23	42	12	6
Monaghan	-	-	-	-	-	-	-
Offaly	*	*	*	*	-	-	-
Roscommon	-	-	-	-	*	*	*
Sligo	-	-	-	-	-	-	-
Tipperary	*	*	*	*	*	*	*
Waterford	*	*	*	*	9	*	*
Westmeath	-	-	-	-	-	*	-
Wexford	50	119	49	145	35	29	16
Wicklow	2	*	*	*	16	9	3
Total	126	564	365	329	536	338	154

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

Appendix Six: Storage Facilities

Table 6.1
Storage Capacity 2004 & 2008

2004				
	Area/Volume	Growers	% used for soft fruit	% used for protected crops (vegetable & amenity)
Pack-House	32,963 square metres	118	42%	58%
Cold Storage	22,199 cubic metres	102	50%	50%
Other Storage	23,714 cubic metres	43	36%	64%

2008				
	Area/Volume	Growers	% used for soft fruit	% used for protected crops (vegetable & amenity)
Pack-House	39,768 square metres	126	37%	63%
Cold Storage	35,048 cubic metres	102	49%	51%
Other Storage	31,130 cubic metres	50	34%	66%

Table 6.2
Storage Capacity 2008 by County

	Pack-House Square Metres	Cold Storage Cubic Metres	Other Storage Cubic Metres
Carlow	*	*	-
Cavan	-	-	-
Clare	*	*	-
Cork	3,408	2,499	*
Donegal	-	-	-
Dublin	21,380	21,325	15,619
Galway	*	*	-
Kerry	*	*	-
Kildare	*	*	*
Kilkenny	*	*	-
Laois	*	*	-
Leitrim	-	-	-
Limerick	558	-	*
Longford	-	-	-
Louth	1,583	1,159	4,636
Mayo	-	-	-
Meath	3,944	1,006	1,163
Monaghan	-	-	-
Offaly	*	*	*
Roscommon	-	-	-
Sligo	-	-	-
Tipperary	*	*	-
Waterford	1,896	1,423	*
Westmeath	-	-	-
Wexford	4,071	3,803	2,564
Wicklow	1,604	2,037	2,012
Total	39,768	35,048	31,130

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