

National Soft Fruit & Protected Vegetable Census 2013

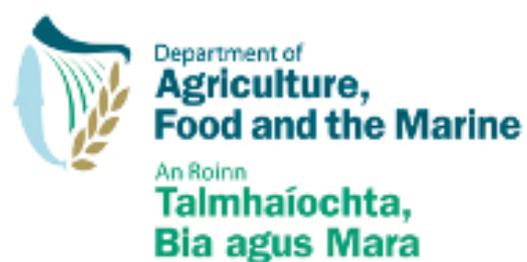


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National Soft Fruit & Protected Vegetable Census 2013

Introduction

The National Soft Fruit & Protected Vegetable Census was conducted in 2013 among growers of soft fruit and protected vegetables operating in the Republic of Ireland in 2012. Excluded from the census are field vegetable crops, amenity crops, the apple and mushroom sectors and hardy nursery stock. To qualify for inclusion in the census growers needed to have either a holding size of outdoor soft fruit greater than 0.2 hectares or 400 square metres (0.1 hectares) of protected (soft fruit or vegetables) production. Where at least one of these criteria was met, all production details (outdoor and protected) were recorded.

This report compares results for 2012 with previous censuses conducted in 2008 and 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 vegetable growers conducted in 1998 and 2001.

It is important to note that figures relating to production represent the 2012 cropping year, while non-production figures (e.g. employment, protected structure area, etc.) relate to 2013. It should also be noted that there was a prolonged period of wet weather during the 2012 calendar year which would have negatively affected yield and value for certain crops. No separate distinction was made between organic and conventional growers, both types of growers were covered in the census. All crop values quoted in this report are farmgate values.

The 2013 surveys were carried out by Department of Agriculture, Food and the Marine (DAFM) personnel, with analysis of the results being conducted by Bord Bia and DAFM. Bord Bia and DAFM wish to thank all the growers and Teagasc for their co-operation in carrying out the census.

Notes: 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 137 growers of soft fruit and protected vegetables in 2012, with a total production area of 523 hectares. The production value of the sector is estimated at €53 million, of which €31 million is from protected soft fruit, €21 million from protected vegetables and €1 million from outdoor soft fruit. The soft fruit and protected vegetable sector provides 503 full-time jobs and 843 part-time jobs.

The overall dynamic is one of increasing production value for soft fruit but declining production value for protected vegetables.

Soft Fruit

The key trend in the soft fruit sector is the increasing production value of soft fruit grown under protection. The value of soft fruit grown under protection in 2012 is €30.8 million, representing a 17% increase since the last census (€26.3 million in 2008) and a 57% increase since 2004 (€19.6 million in 2004). The value of outdoor soft fruit production is €1.1 million, bringing the overall value of the soft fruit sector (outdoor and protected) to €32.0 million. Total soft fruit production area (outdoor and protected) in 2012 is 333 hectares (a 9% decrease since 2008), while the number of soft fruit growers in 2012 is 77 (a 10% increase since 2008). 76% of protected soft fruit production area is under polythene structures and 24% is under glass.

The soft fruit sector is dominated by strawberry production, which accounts for 89% of soft fruit production value. The key trend in strawberry production is increasing production area in glasshouse and in fixed/mobile polytunnels, and a move away from outdoor production and production under cloches. Production value of strawberries is €28.3 million, a 7% increase since the 2008 census (€26.5 million in 2008) and a 30% increase since 2004 (€19.6 million in 2004). There are 57 (outdoor and protected) strawberry growers in 2012 (down 7% since 2008) with a total production area of 169 hectares (down 25% since 2008). The primary counties for strawberry production are Dublin and Wexford. Strawberry production is primarily under protected structures, especially polythene structures. The sector is dominated by larger growers. Of the 47 protected strawberry growers, the seven largest growers account for 77% of protected

strawberry production area. 73% of protected strawberry production area is under polythene structures and 27% is under glass.

Protected Vegetables

Protected vegetable production includes vegetables such as tomatoes, lettuce, peppers and other vegetables grown under glass and polythene protected structures. It excludes vegetable crops that are grown outdoors without protection. The key trend in the protected vegetable sector is increasing production area but decreasing production value. Overall, production area in 2012 is 190 hectares, a 14% increase since the last census (166 hectares in 2008). Grower numbers have increased slightly, from 67 in 2008 to 73 in 2012. Production value of protected vegetables has, however, decreased 17% since the last census, from €25.2 million in 2008 to €21.0 million in 2012. 92% of protected vegetable production area is under glass and 8% is under polythene structures. 69% of protected vegetable production area is in county Dublin.

Tomatoes are the most important protected vegetable crop in terms of value. The number of tomato growers increased from 21 growers in 2008 to 38 growers in 2012. However, both production area and value have declined. Production area in 2012 is 10 hectares (14 hectares in 2008) and production value is €6.9 million (€9.2 million in 2008). Of the total of 38 tomato growers, the largest five growers account for 77% of protected tomato production area. 94% of protected tomato production is under glass and 6% is under polythene structures.

Lettuce is the second most important protected vegetable crop in terms of value. The number of lettuce growers has also increased, from 24 growers in 2008 to 32 growers in 2012. Lettuce production area is relatively unchanged at 118 hectares in 2012 (113 hectares in 2008) but production value has decreased by 19%, from €7.4 million in 2008 to €6.0 million in 2012. Of the total of 32 lettuce growers, the largest five growers account for 74% of protected tomato production area. 99% of protected lettuce production is under glass and 1% is under polythene structures.

Protected Structures

For the purposes of this census, protected structures are glasshouses, fixed polytunnels, mobile polytunnels and cloches (low tunnels). Total protected structure area (as opposed to production area which can be higher due to multiple crop plantings within the year) is 233 hectares, of which 99 hectares are glasshouses and 134 hectares are polythene. Production in glasshouses is primarily (80%) vegetables and production under polythene is primarily (90%) soft fruit.

Storage Facilities

For the purposes of this census, storage facilities are pack-houses, cold stores and ambient stores. Total pack-house area among soft fruit and protected vegetable growers in Ireland is 27,835 m², cold storage volume is 31,493 m³ and other storage volume is 13,844 m³.

For further information on this census, contact:

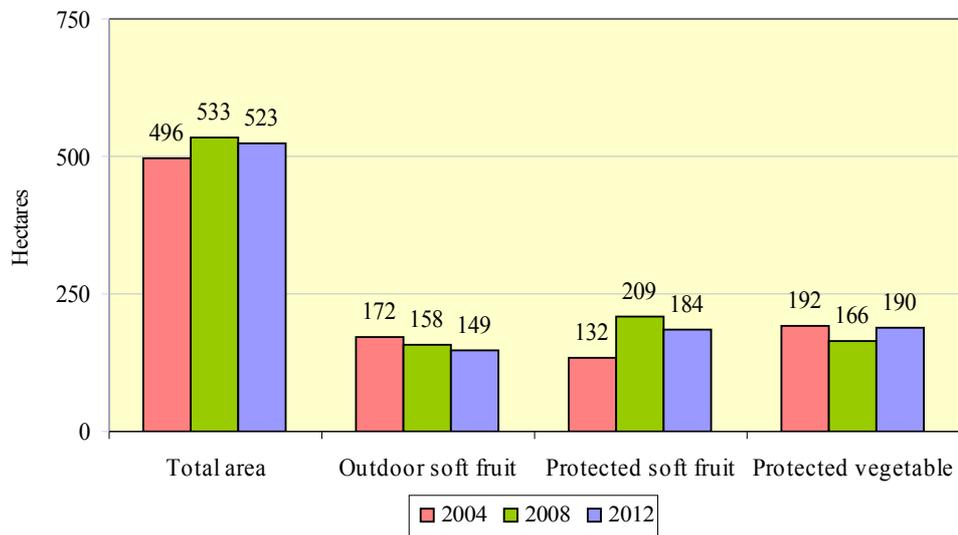
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Section One: Summary Data for Soft Fruit and Protected Vegetable Sectors

This section provides data for the entire soft fruit and protected vegetable 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.

Soft Fruit and Protected Vegetable Production Area in Ireland
in 2004, 2008 and 2012 (hectares)



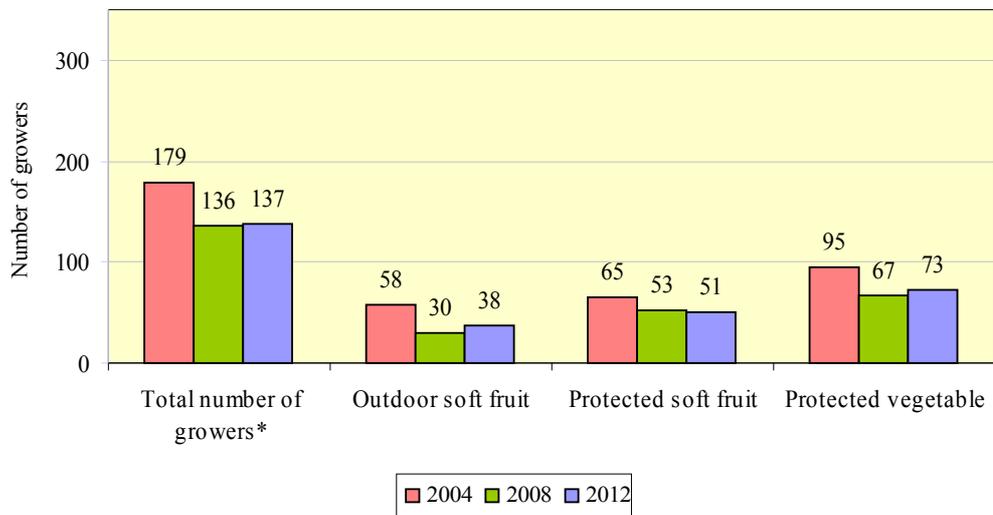
The total production area for soft fruit and protected vegetables in 2012 is 523 hectares. This is a small (2%) decrease from the 2008 census (533 hectares in 2008), but is a 5% increase on the 2004 census (496 hectares in 2004).

The production area for outdoor soft fruit is 149 hectares in 2012, down from 158 hectares in 2008. The production area for protected soft fruit is 184 hectares in 2012, down from 209 hectares in 2008. The reduction in protected soft fruit area is largely due to a significant decrease in strawberry area under cloches, which fell from 64 hectares in 2008 to 9 hectares in 2012.

The production area for protected vegetables is 190 hectares in 2012, which is a 14% increase since 2008.

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.

Number of Soft Fruit and Protected Vegetable Growers in Ireland in 2004, 2008 and 2012



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

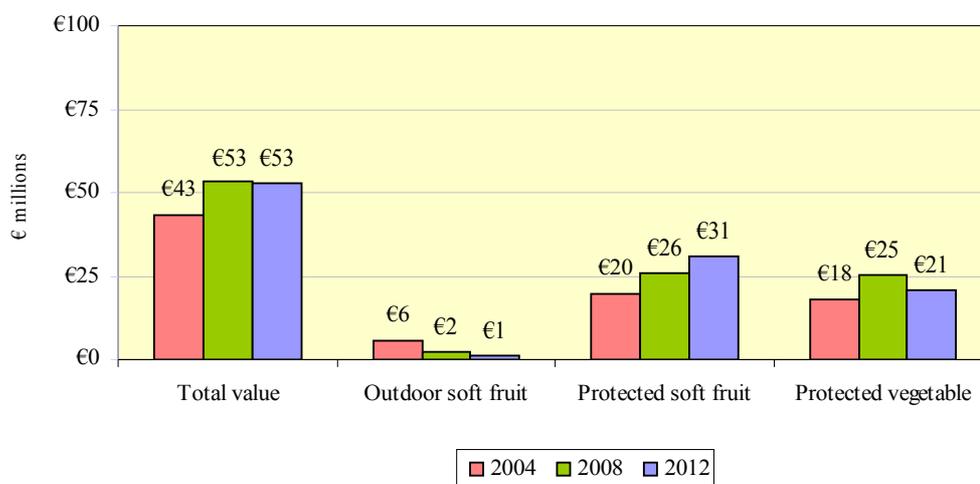
There are 137 growers in the soft fruit and protected vegetable sector in 2012. This is virtually unchanged from 2008 and a decrease of 23% since 2004.

Grower numbers within sub-sectors are broadly similar to that of the previous census:

- There are 38 outdoor soft fruit growers in 2012, up from 30 in 2008
- There are 51 protected soft fruit growers in 2012, down from 53 in 2008
- There are 73 protected vegetable growers in 2012, up from 67 in 2008

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.

Farmgate Value of Soft Fruit and Protected Vegetables in Ireland
in 2004, 2008 and 2012 (€ millions)

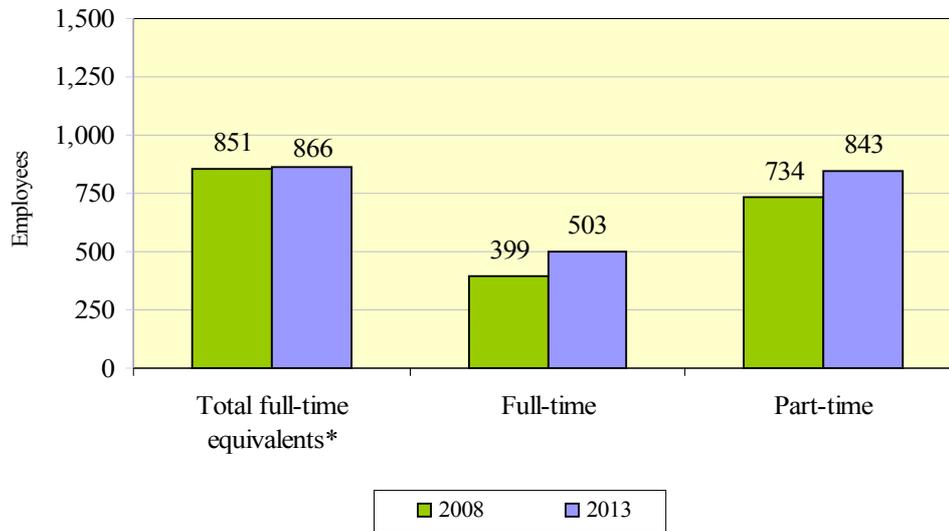


The farmgate value of the soft fruit and protected vegetable sector in 2012 is €53 million. This is unchanged since the last census (€53 million in 2008).

The farmgate value of outdoor soft fruit is €1 million in 2012, down from €2 million in 2008. The exceptionally wet weather in 2012 had a significant impact on the value of outdoor soft fruit crops. The value of protected soft fruit increased to €31 million in 2012, from €26 million in 2008, continuing the trend of increasing value from this sub-sector.

The farmgate value of protected vegetables is €21.0 million in 2012, representing a 17% decrease since the last census (€25.2 million in 2008).

Soft Fruit and Protected Vegetable Employment in Ireland in 2008 and 2013

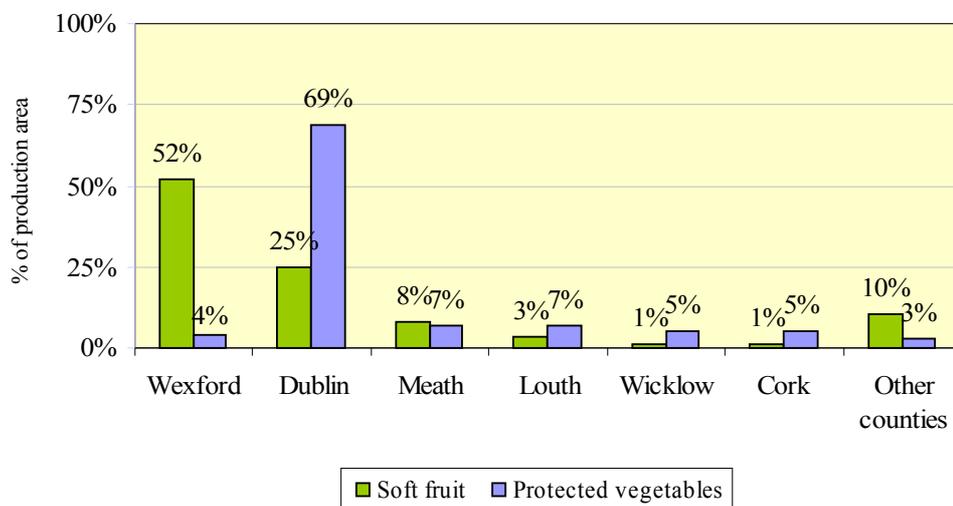


* Full-time jobs plus part-time jobs aggregated to the number of full-time jobs they would represent.

The soft fruit and protected vegetable sector provides 866 full-time equivalent jobs in 2012 (note: excludes seasonal pickers, see appendix 5.1). This is almost unchanged from the last census (851 full-time equivalent jobs in 2008).

The sector provides 503 full-time jobs and 843 part-time jobs.

Percent of Soft Fruit and Protected Vegetable Production Area in Ireland
by County in 2012



* Soft fruit production area = 333 hectares; protected vegetable production area = 190 hectares.

Over half (52%) of soft fruit production area is in Wexford. Dublin accounts for 25% of soft fruit production area and Meath accounts for 8%.

Dublin accounts for over two-thirds (69%) of protected vegetable production area. Meath and Louth each account for 7% of protected vegetable production area, while Wicklow and Cork each account for 5%.

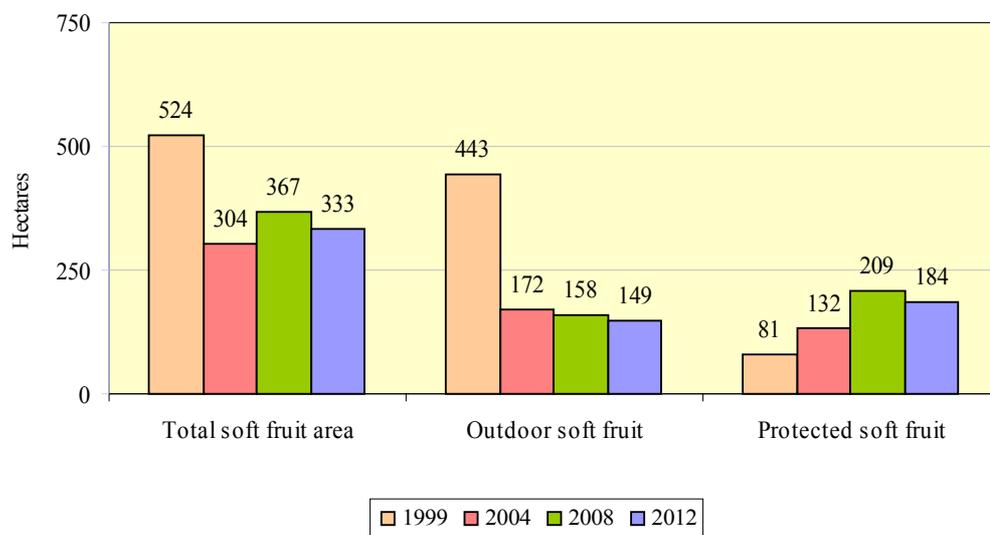
Section Two: Soft Fruit Production

Soft fruit production includes soft fruit grown outdoors and soft fruit grown under protection. The term 'soft fruit' includes fruit 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 previous censuses where appropriate.

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

Soft Fruit Production Area in Ireland
in 1999, 2004, 2008 and 2012 (hectares)



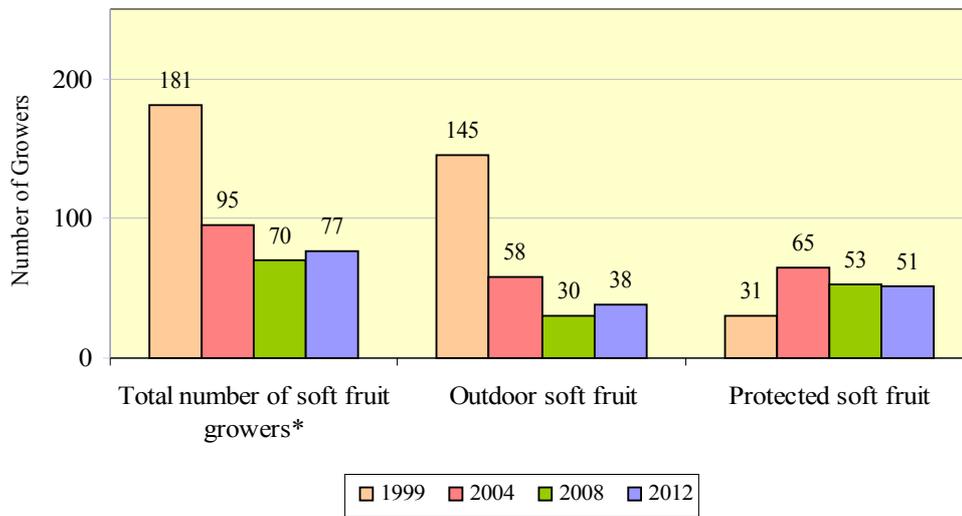
Total soft fruit production area (outdoor + protected) is 333 hectares in 2012, down from 367 hectares in 2008.

Outdoor soft fruit production fell significantly between 1999 and 2004. Contributing factors to this may have been the decline of the fruit processing sector (e.g. the jam making industry) and a shift towards production under protection. Outdoor soft fruit production area is 149 hectares in 2012, down marginally from 158 hectares in 2008.

Blackcurrants grown for the processed market accounted for 114 of the 149 hectares of outdoor soft fruit production area in 2012. However, blackcurrant production in Ireland is subject to contract renewals and market demand. In terms of production value, strawberries are by far the most important soft fruit.

There has been a recent move towards growing raspberries under protection, with production area increasing from 9.6 hectares in 2008 to 19.8 hectares in 2012 (see appendix table 2.2).

Number of Soft Fruit Growers in Ireland
in 1999, 2004, 2008 and 2012

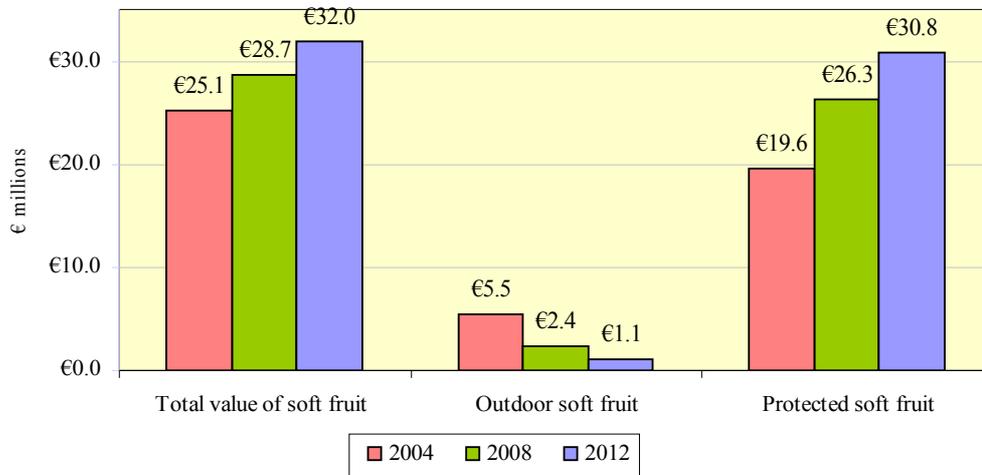


*Some growers are both outdoor and protected growers.

There are 77 (outdoor and/or protected) soft fruit growers in 2012, up from 70 growers in 2008.

There are 38 growers in outdoor soft fruit production in 2012 (up from 30 in 2008) and 51 in protected soft fruit production (down from 53 in 2008).

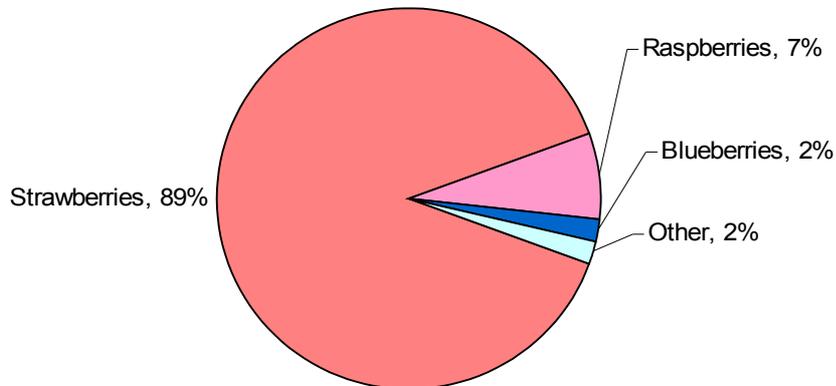
Farmgate Value of Soft Fruit in Ireland
in 2004, 2008 and 2012 (€ millions)



The value of soft fruit production in 2012 is €32 million. This is an 11% increase since the last census (€28.7 million in 2008).

The value of outdoor soft fruit production is €1.1 million in 2012 (down from €2.4 million in 2008). Again, the unusually wet weather of 2012 is likely to have had a significant impact of production values. The value of protected soft fruit is €30.8 million (up from €26.3 million in 2008).

Breakdown of Farmgate Value of Soft Fruit by Fruit Type in Ireland in 2012



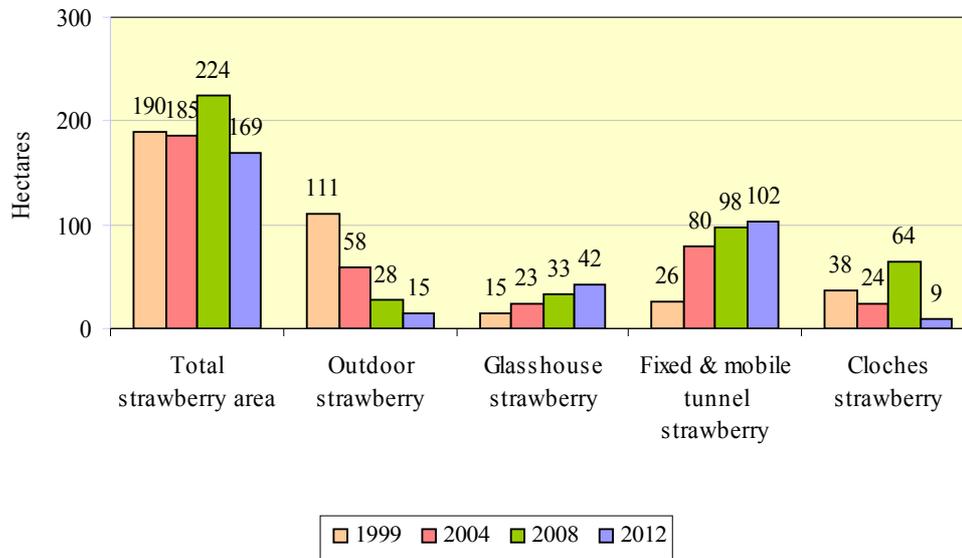
Strawberries are by far the most important fruit type in terms of value. The value of strawberry production accounts for 89% of the total value of soft fruit grown in Ireland. Almost all strawberry sales (99.9%) are sold into the fresh market. A very small proportion (0.1%) are sold to the organic market, with no significant sales to the processing market.

Raspberries account for 7% of total fruit value, while blueberries account for 2%. All (100%) raspberry sales are sold to the fresh market.

There are 57 (outdoor and/or protected) strawberry growers in 2012 and 26 raspberry growers. 20 growers grow both strawberries and raspberries.

The following charts provide information on strawberry production.

Strawberry Production Area in Ireland
in 1999, 2004, 2008 and 2012 (hectares)

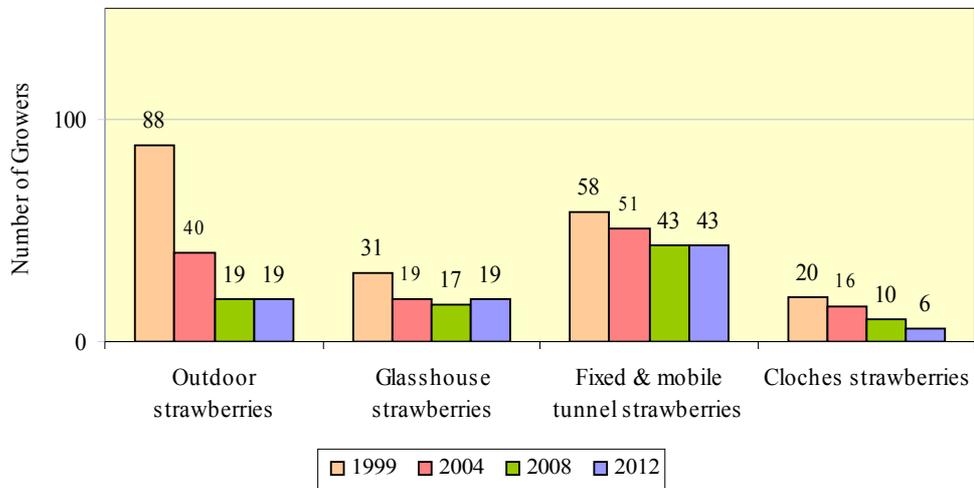


Total production area for strawberries is 169 hectares in 2012, down from 224 hectares in 2008. However, the trend in increasing production under glass and fixed/mobile polytunnels is evident in the above chart.

Outdoor strawberry production is 15 hectares in 2012, down from 28 hectares in 2008. The main county for outdoor strawberries is Wexford (9.7 hectares in 2012, representing 65% of production area).

Total protected strawberry production (glasshouse, polytunnels and cloches) is 153 hectares in 2012, down from 196 hectares in 2008. Production is primarily under fixed or mobile tunnels. Production area under fixed and mobile tunnels is 102 hectares in 2012 (up from 98 hectares in 2008). Production area in glasshouses has also increased, from 33 hectares in 2008 to 42 hectares in 2012. However, production under cloches is substantially down from the last census (64 hectares in 2008 to 9 hectares in 2012). The increase in production area under cloches between 2004 and 2008 was likely due to growers pursuing low cost growing systems as they moved from outdoor strawberry production. Many of these cloches have subsequently been replaced by more permanent structures.

Number of Strawberry Growers by Production System in Ireland in 1999, 2004, 2008 and 2012



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

Overall, the total number of strawberry growers (outdoor and protected) in 2012 is 57 (down from 61 growers in 2008). (Note: this is less than the sum of the growers shown in the above chart as some growers are in more than one category).

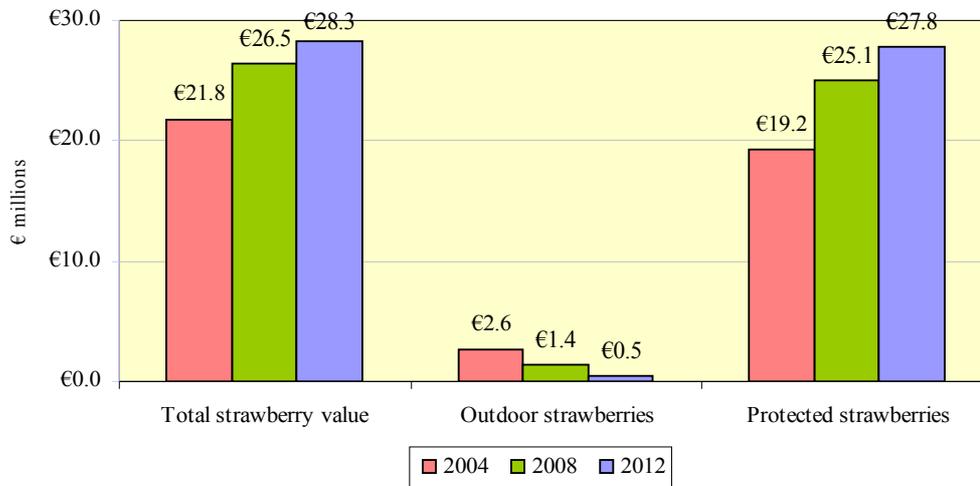
There are 19 outdoor strawberry growers in 2012, which is unchanged from the 2008 census.

The total number of protected strawberry growers (i.e. growing under glasshouse, fixed/mobile tunnels or cloches) in 2012 is 47 (down from 51 growers in 2008).

Within protected strawberry production, there are:

- Two additional glasshouse strawberry growers since 2008
- The number of fixed/mobile polytunnels growers is unchanged since 2008
- There are only 6 growers growing strawberries under cloches, as the system is being replaced with more permanent structures

Farmgate Value of Strawberries in Ireland
in 2004, 2008 and 2012 (€ millions)



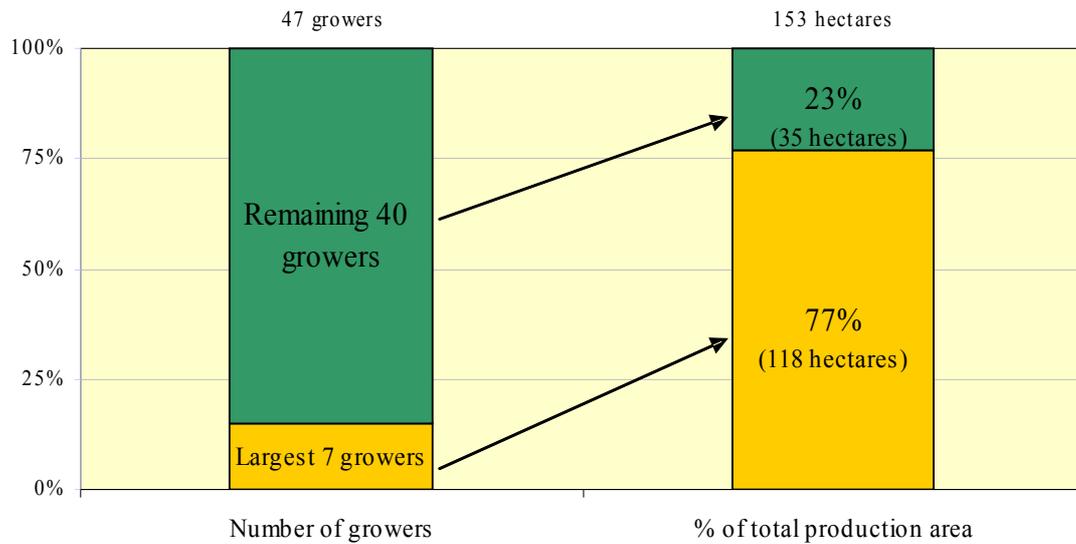
The value of strawberry production in 2012 is €28.3 million. This is a 7% increase since the last census (€26.5 million in 2008).

The value of outdoor strawberry production is €0.5 million in 2012, down from €1.4 million in 2008. This reflects a combination of the decline in outdoor production area and the difficult growing conditions in 2012. However, the value of protected strawberry production is €27.8 million, up from €25.1 million in 2008.

In protected strawberry production, 73% of production area is under polythene structures and 27% is under glass.

Comparable figures for 1999 are not available.

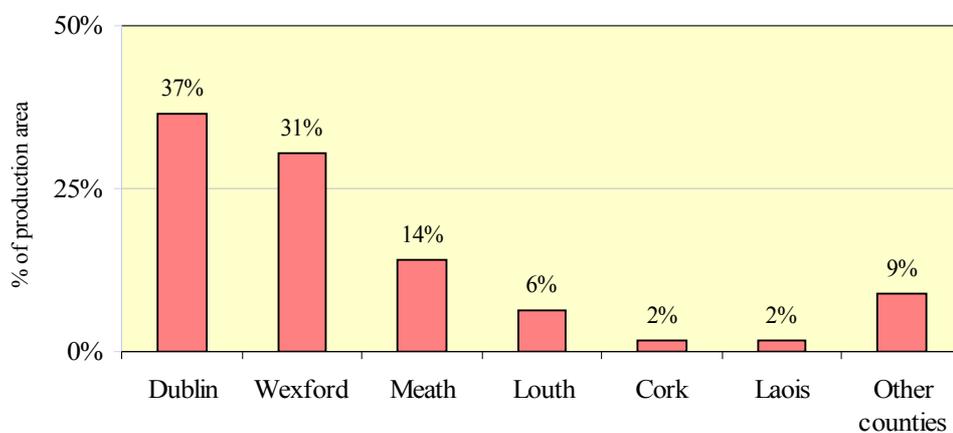
Contribution of Largest Protected Strawberry Growers by Area in 2012



Protected strawberry production is dominated by a small number of large-scale growers. Of the 47 growers of protected strawberries, the 7 largest growers account for 77% of the total production area.

Outdoor strawberry production (not shown) is less dominated by larger growers. There are 19 growers in outdoor production, with a combined production area of 15 hectares. Of these 19 growers, the 4 largest growers account for 49% of the production area.

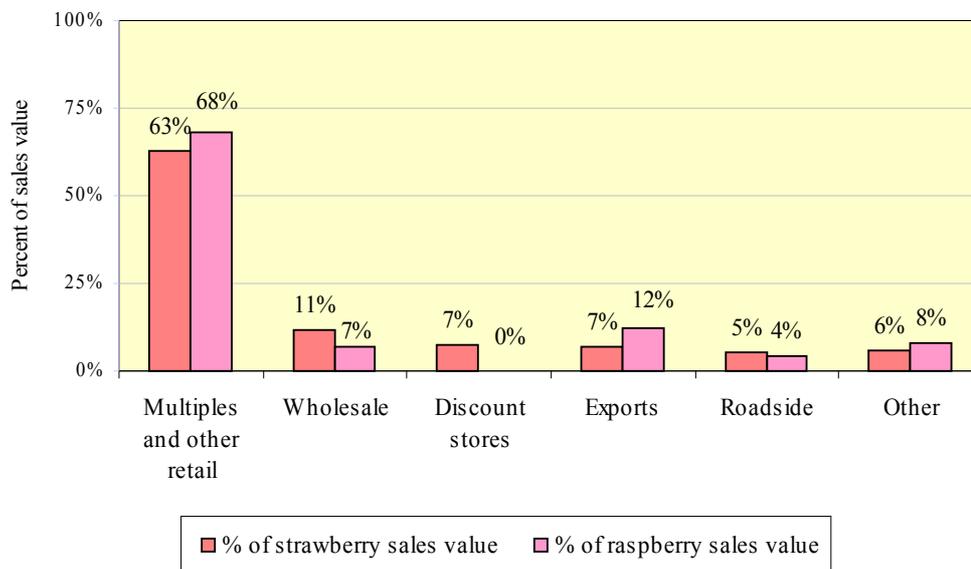
Percent of Strawberry Production Area in Ireland by County in 2012



* Outdoor and protected strawberry production area = 169 hectares.

Strawberry production is concentrated in the Leinster region. Dublin has 62 hectares of (outdoor and protected) strawberries, representing 37% of total strawberry production area. Wexford has 51 hectares (31% of production area) and Meath has 24 hectares (14% of production area).

Market Outlets for Strawberry and Raspberry Sales to Fresh Market in Ireland in 2012



Strawberry sales to the fresh market are primarily to the retail sector. 63% of strawberry sales value is to retail multiples/other retail and 7% is sold to discount stores. 11% of sales are to the wholesale trade, 7% to the export market and 5% are 'roadside' sales.

Over two-thirds (68%) of raspberry sales is to retail multiples/other retail, 12% is to the export market, 7% to wholesale and 4% are roadside sales.

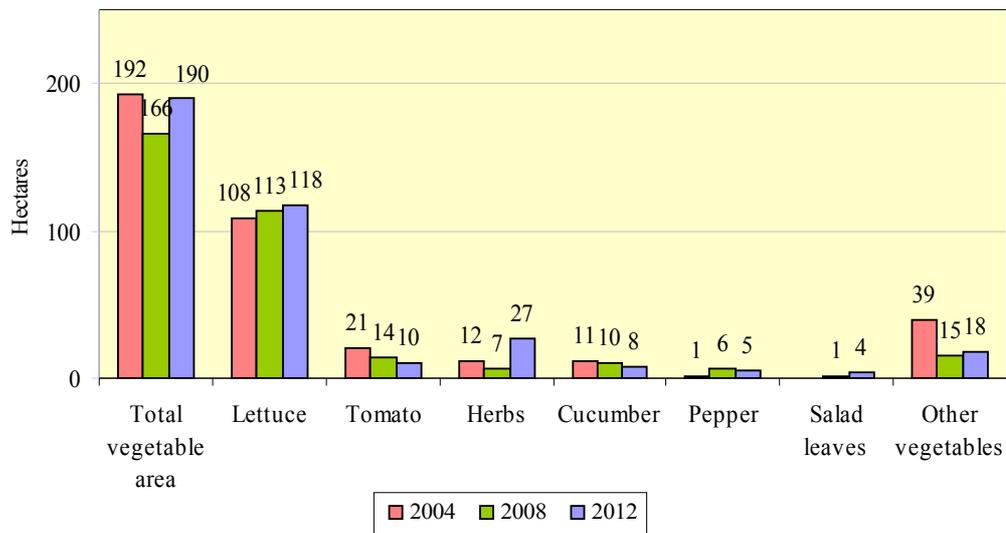
Section Three: Protected Vegetable Production

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 separately.

Comparisons are made with previous censuses where appropriate.

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

Protected Vegetable Production Area in Ireland
in 2004, 2008 and 2012 (hectares)



Total production area for protected vegetables is 190 hectares in 2012, a 14% increase since the last census (166 hectares in 2008).

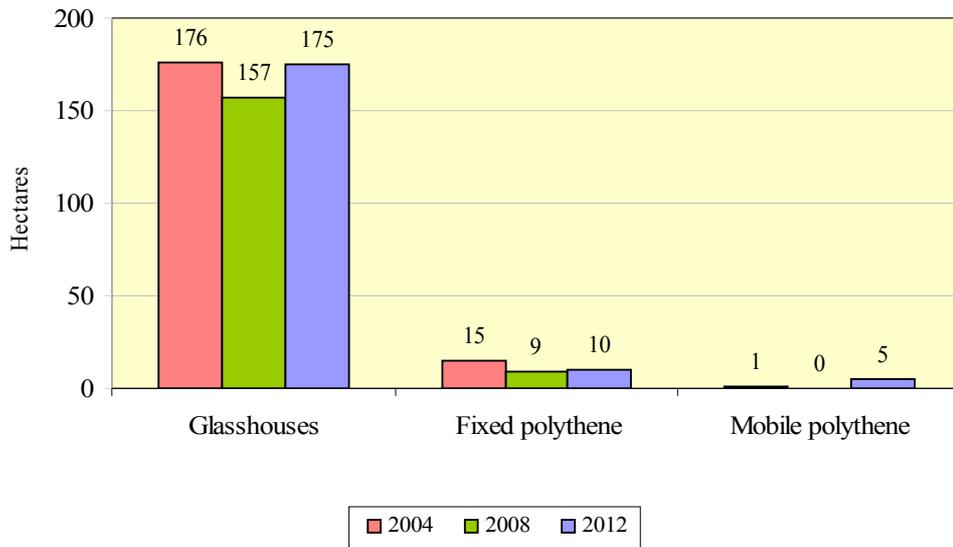
Protected lettuce accounts for 62% of protected vegetable production area, with 118 hectares grown in 2012 (up from 113 hectares in 2008).

Production area for tomatoes is 10 hectares in 2012, down from 14 hectares in 2008.

The production area for protected herbs is 27 hectares in 2012, up from 7 hectares in 2008. Salad leaves show the biggest percentage increase, with a production area of 4 hectares (up from 1 hectare in 2008)

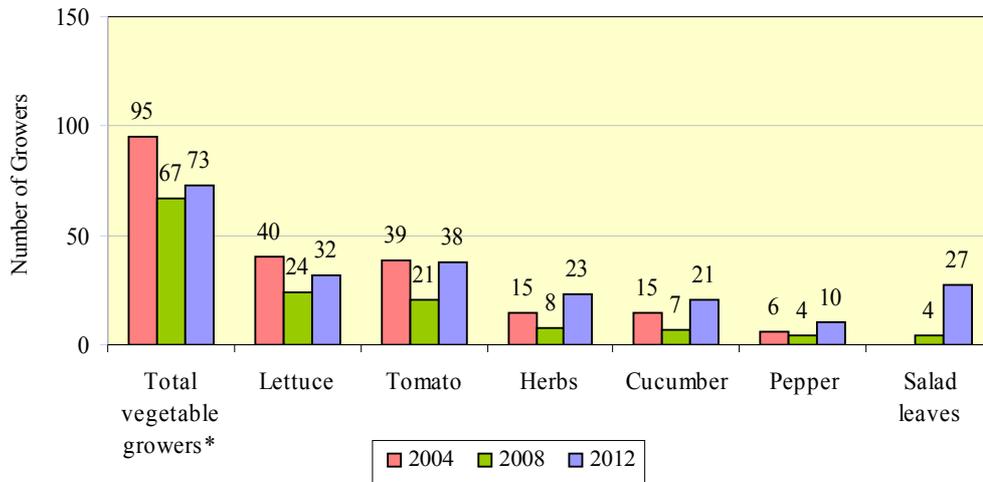
Dublin is by far the most important county for production of protected vegetables with 131 hectares (i.e. Dublin accounts for 69% of protected vegetable production area).

Protected Vegetable Production Area by Protected Structure in Ireland
in 2004, 2008 and 2012 (hectares)



Protected vegetable production is predominantly under glass, rather than polythene. Production area of protected vegetables under glass is 175 hectares in 2012, an 11% increase since the last census (157 hectares in 2008). Production area under fixed polythene is 10 hectares and mobile tunnels is 5 hectares.

Number of Protected Vegetable Growers in Ireland in 2004, 2008 and 2012

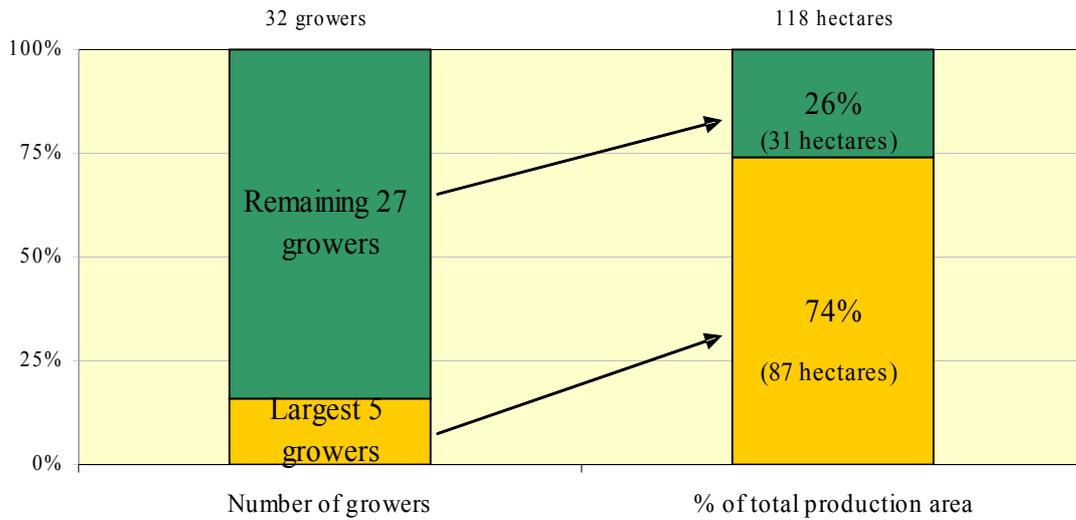


*Less than the sum of all crops because some growers grow more than one crop type.

There are 73 protected vegetable growers in 2012, up from 67 growers in 2008.

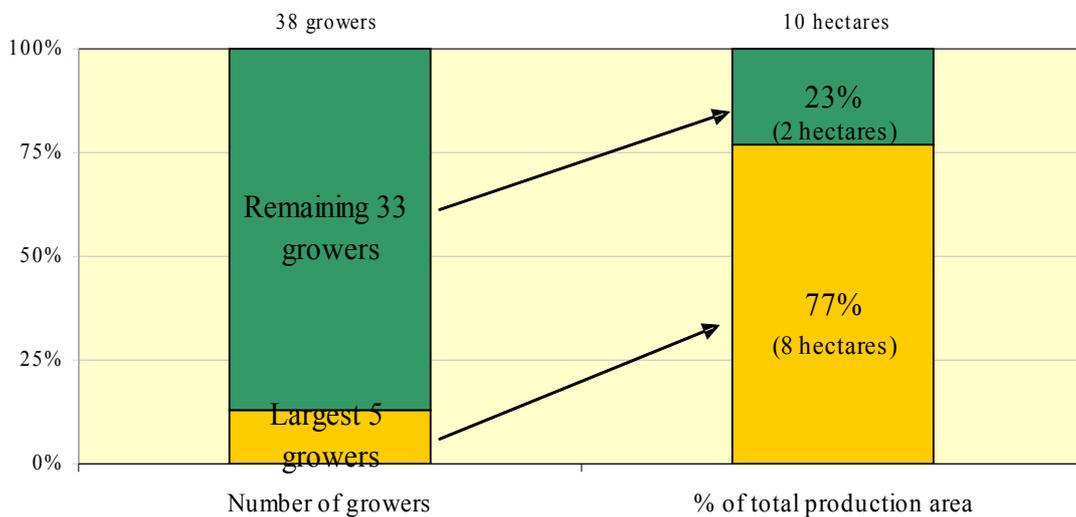
The number of growers involved in production of all the primary protected vegetable crops has increased since 2008. However, many of these new growers are relatively small-scale operations supplying local markets. Grower numbers for herbs and salad leaves show the biggest proportional increases.

Contribution of Largest Protected Lettuce Growers by Area in 2012



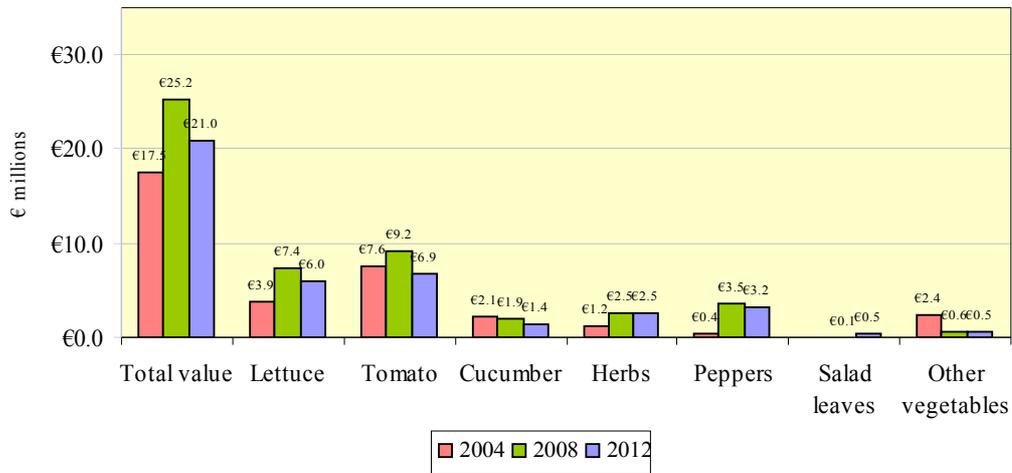
Protected lettuce production is dominated by larger growers. Of the 32 protected lettuce growers in 2012, the 5 largest growers account for 74% of production area.

Contribution of Largest Protected Tomato Growers by Area in 2012



Protected tomato production is also dominated by larger growers. Of the 38 protected tomato growers in 2012, the 5 largest account for 77% of production area.

Farmgate Value of Protected Vegetables in Ireland
in 2004, 2008 and 2012 (€ millions)

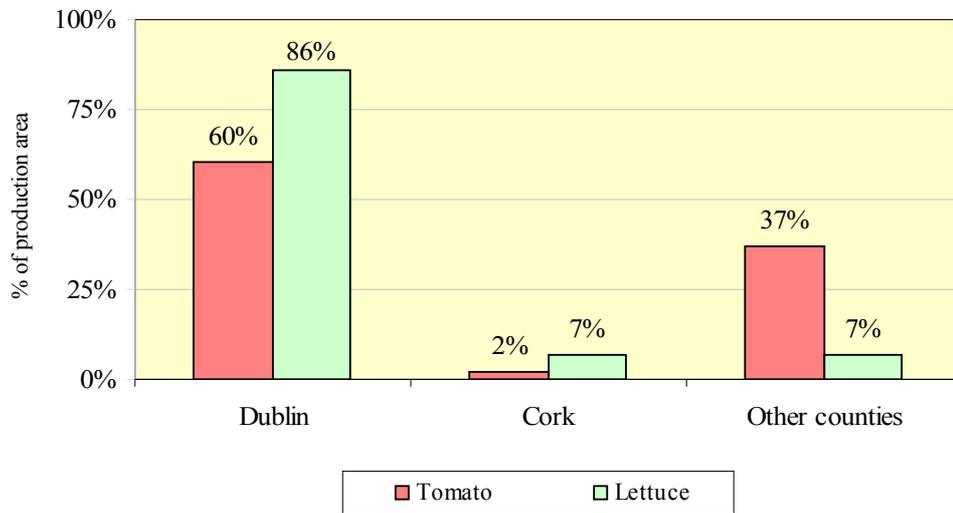


The value of protected vegetable production is €21.0 million in 2012, a 17% decrease since the last census (€25.2 million in 2008).

Tomatoes are the most important protected vegetable in terms of value. The production value of tomatoes is €6.9 million in 2012 (down from €9.2 million in 2008).

The production value for lettuce is €6.0 million in 2012, down from €7.4 million in 2008.

Percent of Protected Tomato and Lettuce Production Area in Ireland by County in 2012

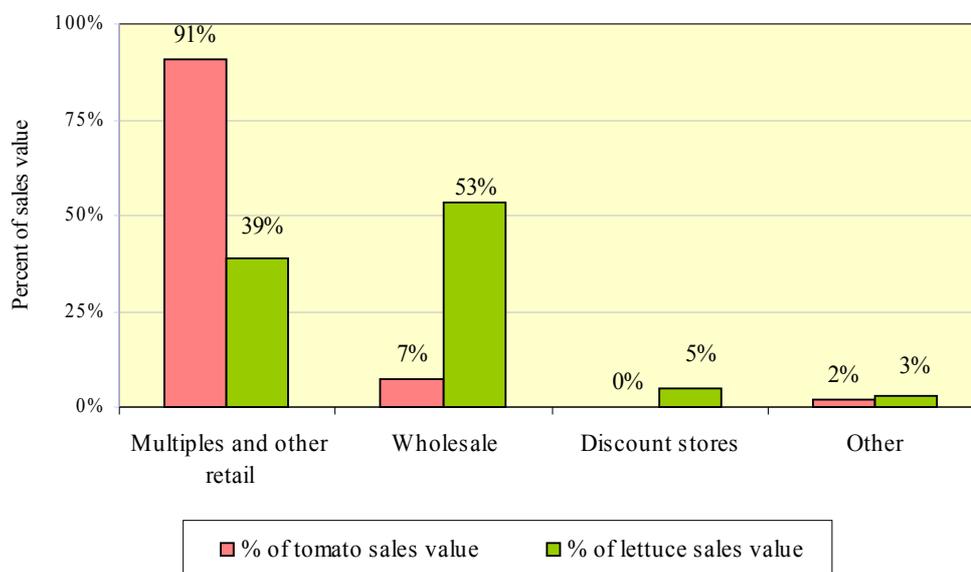


* Tomato production area = 10 hectares; lettuce production area = 118 hectares.

Protected tomato and lettuce production tends to be concentrated near the main urban centres. Dublin has 6 hectares of protected tomatoes, representing 60% of total tomato production area.

Dublin is also the main county for protected lettuce production. Dublin has 101 hectares of protected lettuce, representing 86% of total lettuce production area. Cork has 7.7 hectares of protected lettuce, representing 6.5% of total lettuce production area.

Market Outlets for Protected Tomato and Lettuce Sales to Fresh Market in Ireland in 2012



91% of tomato sales to the fresh market are sold to multiples and other retail (i.e. retail excluding discount stores). 7% of tomato sales are to the wholesale sector.

Half (53%) of lettuce sales to the fresh market are to the wholesale sector. 44% of lettuce sales are to retail sector (i.e. multiples, discount stores and other retail).

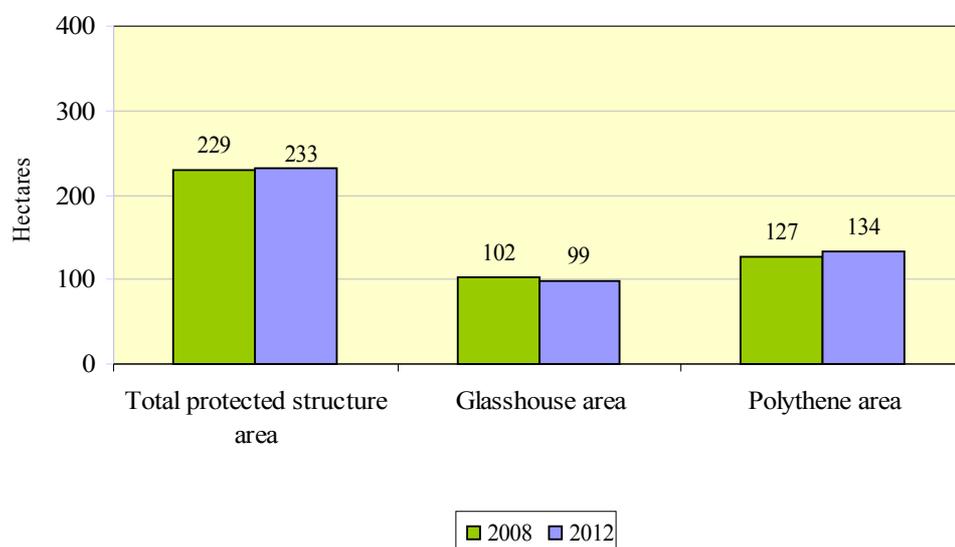
Section Four: Protected Structure Area

This section shows the area and usage of glasshouses and polythene structures. For the purposes of this census, protected structures are defined as glasshouses, 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.

There is very little overall change in glasshouse or polythene structure area since the previous census in 2008. However, within polythene structures there has been a significant increase in fixed polythene tunnels and a corresponding decrease in mobile tunnels and cloches.

Protected Structure Area among Protected Soft Fruit and Protected Vegetable Growers in Ireland in 2008 and 2012 (hectares)

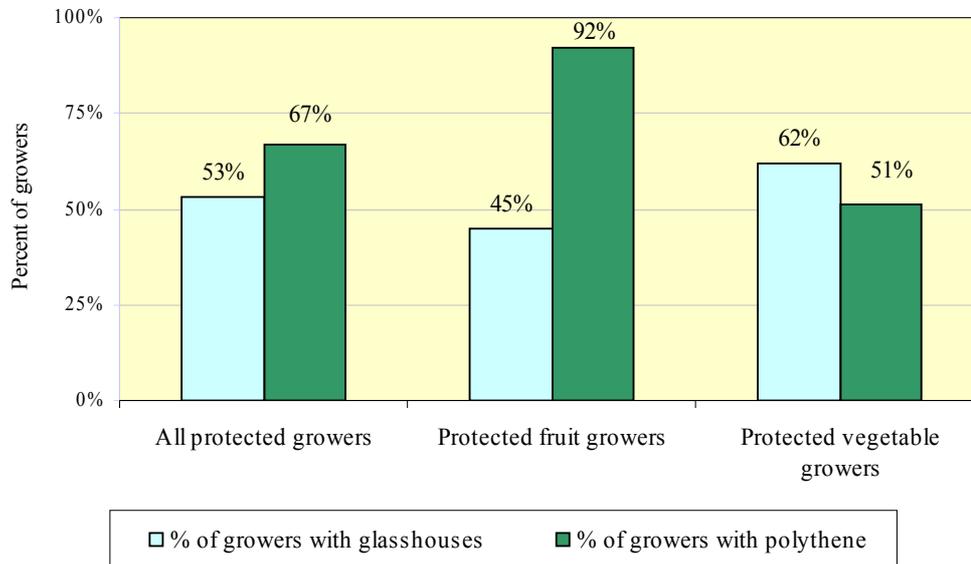


Total protected structure (glasshouses and polythene) is 233 hectares in 2012, virtually unchanged since the previous census (229 hectares in 2008). Glasshouse area is 99 hectares (102 hectares in 2008) and polythene area is 134 hectares (127 hectares in 2008).

Dublin has by far the highest area of glasshouses. Dublin has 72 hectares of glasshouses, representing 73% of total glasshouse area.

Dublin and Wexford have the highest area of polythene tunnels. Dublin has 50 hectares of polythene (37% of total polythene area) and Wexford has 27 hectares (20% of polythene area).

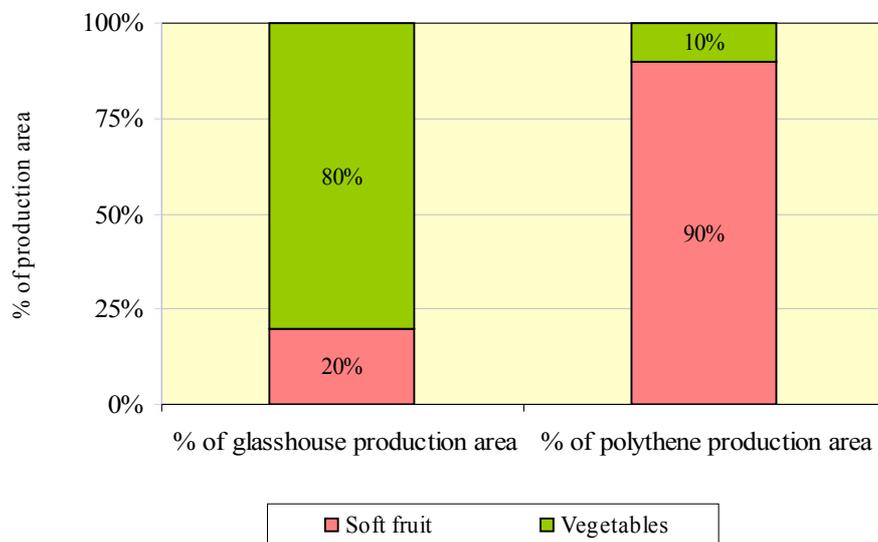
Percent of Protected Soft Fruit and Protected Vegetable Growers
in Ireland with Protected Structures in 2012



53% of all protected crop (soft fruit and/or vegetables) growers have glasshouses, and 67% have polythene structures.

Among protected fruit growers, 45% have glasshouses and 92% have polythene structures. Among protected vegetable growers, 62% have glasshouses and 51% have polythene structures.

Protected Structure Usage by Protected Soft Fruit and Protected Vegetable Growers
in Ireland in 2012

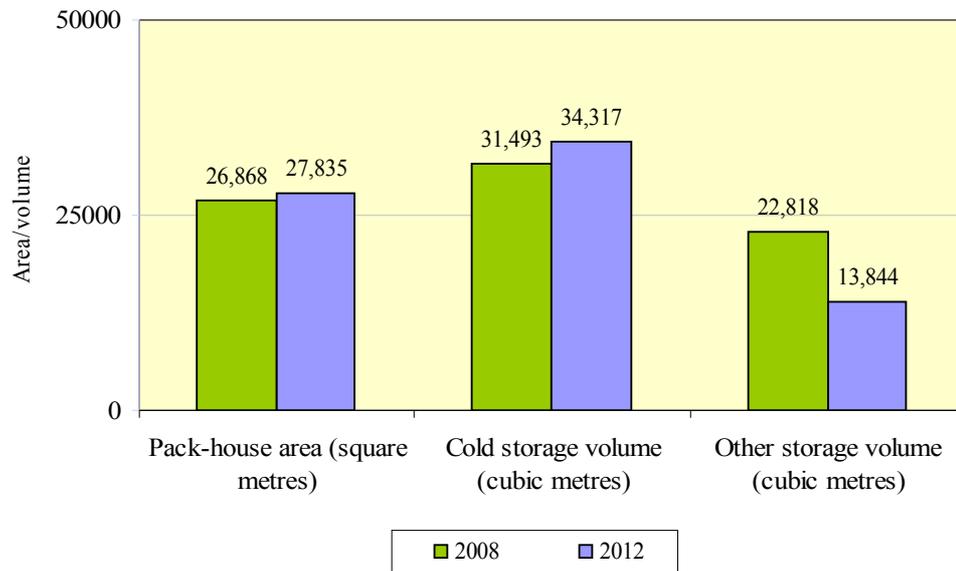


Glasshouses are mostly used for vegetables and polythene for soft fruit. Of total production area in glasshouses, 80% is for vegetable production and 20% for soft fruit production. Of total production area under polythene, 90% is for soft fruit production and 10% for vegetable production.

Section Five: Storage Facilities & Grower Profile

This section shows the area and volume of storage facilities among soft fruit and protected crop growers, and a grower profile.

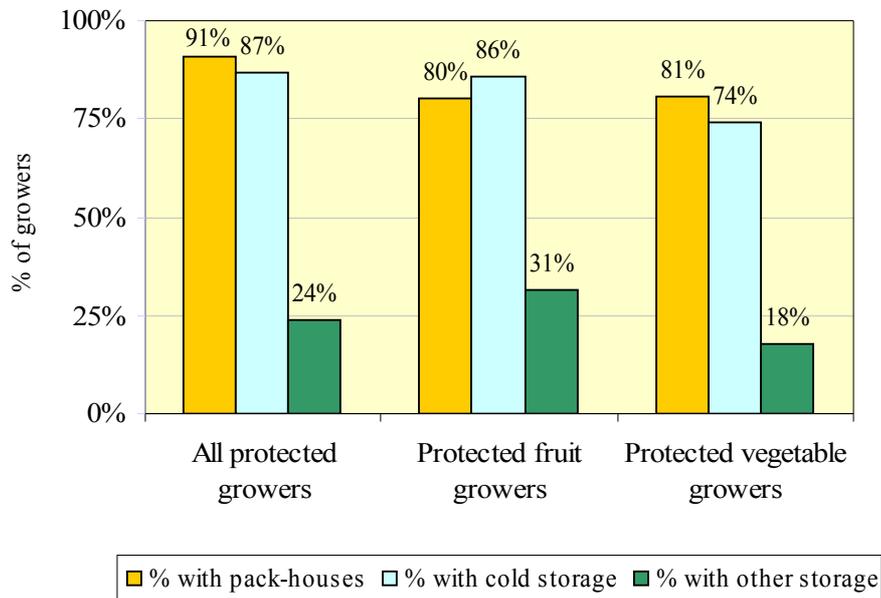
Storage Facility Area/Volume among Soft Fruit and Protected Vegetable Growers
in Ireland in 2008 and 2012



Total pack-house area among soft fruit and protected vegetable growers in Ireland in 2012 is 27,835 m², representing a small (4%) increase since 2008. Cold storage volume is up 9%, from 31,493 m³ in 2008 to 34,317 m³ in 2012. Other storage volume is down 39%, from 22,818 m³ in 2008 to 13,844 m³ in 2012.

Dublin has by far the highest storage capacity, with 16,437 m² of pack-houses, 26,325 m³ of cold storage and 3,107 m³ of other storage.

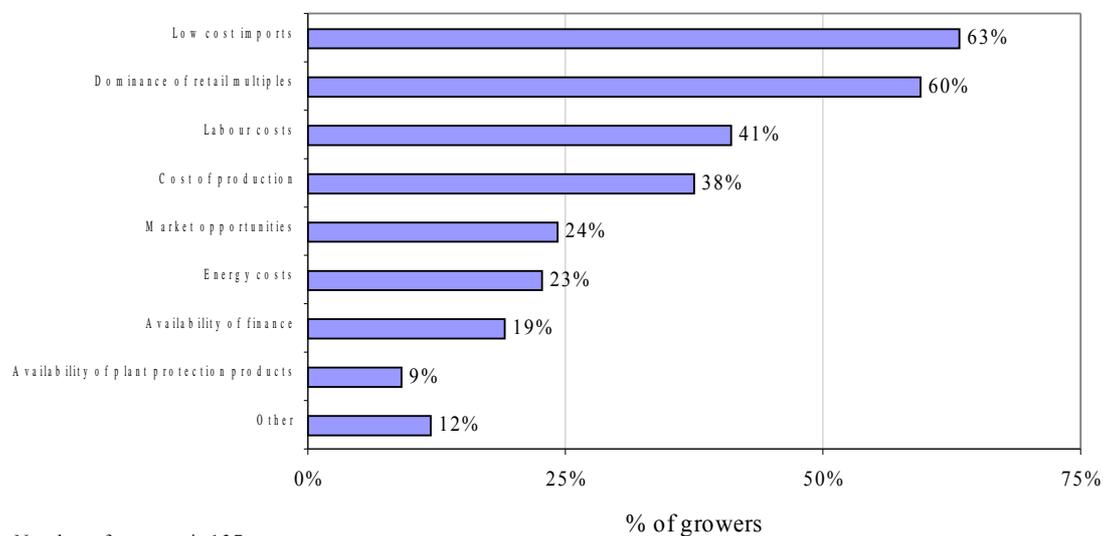
Percent of Soft Fruit and Protected Vegetable Growers
in Ireland with Storage Facilities in 2012



91% of all growers in protected soft fruit and/or vegetable production have pack-houses, 87% have cold storage and 24% have other storage facilities.

Among protected soft fruit growers, 80% have pack-houses, 86% have cold storage and 31% have other storage facilities. The figure for pack-houses is similar for protected vegetable growers, with 81% having pack-houses. However, the proportion with cold and other storage is slightly lower, with 74% having cold storage and 18% having other storage facilities. This is due to a higher proportion of small-scale growers within the protected vegetable sector as compared to the protected soft fruit sector.

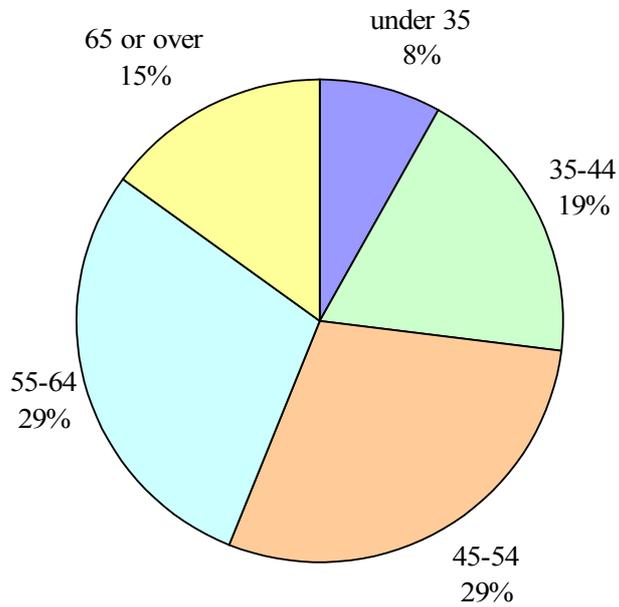
Stated Barriers to Expansion for Soft Fruit and Protected Vegetable Growers in Ireland in 2013



When asked about the barriers to expansion, the top-two barriers were *low cost imports* (mentioned by 63% of growers) and the *dominance of retail multiples* (60%). It is clear that, given the costs of production in Ireland, these two issues are a challenge for growers.

When asked about development plans, 31% of growers say they plan to further develop their soft fruit/protected vegetable production business in the next 2 years.

Age Profile of Soft Fruit and Protected Vegetable Growers in Ireland in 2013



Number of growers is 137.

The age profile of soft fruit and protected vegetable growers in Ireland in 2013 is quite balanced, with over half (56%) under 55 years of age.

29% of growers have an identified successor for their business.

Section Seven: Appendix Tables

Appendix One: Production Area, Grower Numbers and Value

Table 1.1: Outdoor Soft Fruit Production (for Fresh market, excludes processing market) in Ireland in 1999, 2004, 2008 & 2012

	1999		2004			2008			2012		
	Hectares	Growers	Hectares	Growers	Estimated Value (€ millions)	Hectares	Growers	Estimated Value (€ millions)	Hectares	Growers	Estimated Value (€ millions)
Outdoor Strawberries	111.3	88	53.9	36	€2.5	28.1	19	€1.5	15.3	19	€0.5
Outdoor Raspberries	44.2	49	30.3	28	€1.3	7.0	12	€0.2	4.0	12	€0.1
Outdoor Blueberries	13.5	5	7.0	3	€0.2		2			2	
Outdoor Blackcurrants***	11.2	16	3.4	10	€0.0	0.3	3	€0.0	68.2	8	€0.3
Outdoor Blackberries	4.0	8	3.0	9	€0.0	3.1	4	€0.1		1	
Outdoor Gooseberries	6.4	20	3.3	12	€0.0	0.8	5	€0.0	1.1	7	€0.0
Outdoor Tayberries	3.7	14	3.8	9	€0.1	-	-	-	0.7	3	€0.0
Other Outdoor Fruits	7.0	*	2.5	4	€0.0		1		2.2	6	€0.0
Total Outdoor Fruits**	201.3	108	107.2	48	€4.1	49.1	23	€1.8	102.4	38	€1.0

* 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 and Protected Vegetable Production in Ireland in 1998, 2001, 2004, 2008 and 2012

	1998			2001			2004			2008			2012		
	Hectares	Growers	Estimated Value (€ millions)	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	€19.2	195.9	51	€25.1	153.3	47	€27.8
Protected Raspberries	*	*	*	*	*	*	***	8	***	9.6	10	€1.0	19.8	15	€2.1
Other Protected Fruit	*	*	*	*	*	*	***	2	***	3.3	7	€0.2	11.0	11	€0.9
Total Protected Soft Fruit**	*	*	*	*	*	*	132.0	65	€19.6	208.8	53	€26.3	184.1	51	€30.8
Protected Tomatoes	30	47	€5.2	27	40	€6.3	20.4	39	€7.6	14.4	21	€9.2	9.9	38	€6.9
Protected Lettuce	133	66	€4.1	103	58	€4.2	108.4	40	€3.9	113.4	24	€7.4	117.5	32	€6.0
Protected Cucumbers	14	20	€1.5	14	16	€1.5	11.1	15	€2.1	9.6	7	€2.0	8.0	21	€1.4
Protected Herbs	*	*	*	*	*	*	11.9	15	€1.2	6.5	8	€2.5	27.3	23	€2.5
Protected Celery	13	22	€0.6	9	16	€0.6	6.6	12	€0.4	2.7	6	€0.1	0.5	7	€0.1
Protected Peppers	*	*	*	***	2	***	1.4	6	€0.4	6.1	4	€3.5	4.8	10	€3.2
Salad leaves	*	*	*	*	*	*	*	*	*	0.7	4	€0.1	4.0	27	€0.5
Other Protected Vegetables	*	*	*	*	*	*	32.3	36	€2.1	12.5	25	€0.5	17.8	41	€0.4
Total Protected Vegetables**	*	*	*	*	*	*	192.1	95	€17.6	166.0	67	€25.2	189.8	73	€21.0

* 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: Soft Fruit and Protected Vegetable Production in Ireland by County in 2012 (hectares)

	Outdoor Fruit	Protected Fruit	Protected Vegetables	Total	Outdoor Fruit	Protected Fruit	Protected Vegetables	Total **	Outdoor Fruit	Protected Fruit	Protected Vegetables	Total
	Hectares	Hectares	Hectares	Hectares	Growers	Growers	Growers	Growers	Estimated Value €	Estimated Value €	Estimated Value €	Estimated Value €
Carlow			-		2	1	-	2			-	
Cavan	-	-	-	-	-	-	-	-	-	-	-	-
Clare	-	-	-	-	-	-	-	-	-	-	-	-
Cork		3.0	9.5		1	6	16	23		€712,140	€442,248	
Donegal	-	-	-	-	-	-	-	-	-	-	-	-
Dublin		80.2	130.7		1	9	28	35		€17,050,058	€13,936,104	€31,023,222
Galway		-	2.9		1	-	6	6		-	€116,907	
Kerry	-				-	1	2	3	-			
Kildare			-		2	1	-	2			-	
Kilkenny			-		1	2	-	2			-	
Laois			-		3	3	-	3			-	
Leitrim		-			1	-	1	1		-		
Limerick	-	-	-	-	-	-	-	-	-	-	-	-
Longford	-		-		-	1	-	1	-		-	
Louth	-	10.8	13.2	24.0	-	4	3	6	-	€871,975	€1,141,172	€2,013,146
Mayo	-	-	-	-	-	-	-	-	-	-	-	-
Meath	-	26.4			-	7	2	9	-	€3,694,555		
Monaghan	-				-	1	1	1	-			
Offaly	9.4	-			4	-	1	4	€98,600	-		
Roscommon		-			1	-	2	2		-		
Sligo	-	-	-	-	-	-	-	-	-	-	-	-
Tipperary			-		1	1	-	1			-	
Waterford	-				-	2	1	2	-			
Westmeath			-		1	1	-	1			-	
Wexford	126.3	46.1	7.0	179.4	17	10	3	24	€752,721	€6,048,492	€1,756,200	€8,557,413
Wicklow			10.1		2	1	7	9			€1,429,319	
Total	148.8	184.1	189.8	522.7	38	51	73	137	€1,138,327	€30,818,629	€20,969,094	€52,926,049

Some figures 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 per Grower of Soft Fruit and Protected Vegetables in Ireland in 2004, 2008 and 2012 (hectares)

	2004	2008	2012
	Hectares (Average)*	Hectares (Average)*	Hectares (Average)*
Outdoor fruit	3.0	5.3	3.9
Protected fruit	2.0	3.9	3.6
Protected vegetables	2.0	2.5	2.6
Average of all sectors	2.1	2.6	3.8

* 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 per Grower of Soft Fruit and Protected Vegetables in Ireland by County in 2012 (hectares)

	Hectares (Average)
Carlow	
Cavan	-
Clare	-
Cork	0.6
Donegal	-
Dublin	6.1
Galway	0.5
Kerry	1.5
Kildare	
Kilkenny	
Laois	1.9
Leitrim	
Limerick	-
Longford	
Louth	4.0
Mayo	-
Meath	4.4
Monaghan	
Offaly	2.4
Roscommon	
Sligo	-
Tipperary	
Waterford	
Westmeath	
Wexford	7.5
Wicklow	1.5
All counties	3.8

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

Table 1.6: Soft Fruit and Protected Vegetable Production Area by Holding Size in 2012 (hectares)

2012			
	Outdoor Fruit	Protected Fruit	Protected Vegetables
	Hectares	Hectares	Hectares
Less than 0.2 Ha.		2	2
0.2 to 0.4 Ha.	1		3
over 0.4 to 0.8 Ha.	2	5	18
Greater than 0.8 Ha.	146	177	166
Total	149	184	190

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

Table 1.7: Number of Soft Fruit and Protected Vegetable Growers by Holding Size in Ireland in 2012

2012			
	Outdoor Fruit	Protected Fruit	Protected Vegetables
	No. of Growers	No. of Growers	No. of Growers
Less than 0.2 Ha.	2	11	19
0.2 to 0.4 Ha.	3	2	11
over 0.4 to 0.8 Ha.	6	9	11
Greater than 0.8 Ha.	27	29	32
Total	38	51	73

Table 1.8: Farmgate Value of Soft Fruit and Protected Vegetables by Holding Size in Ireland in 2012

2012			
	Outdoor Fruit	Protected Fruit	Protected Vegetables
	Estimated Value (€)	Estimated Value (€)	Estimated Value (€)
Less than 0.2 Ha.		245,812	302,344
0.2 to 0.4 Ha.	13,100		327,406
over 0.4 to 0.8 Ha.	50,759	1,037,759	2,057,894
Greater than 0.8 Ha.	1,073,938	29,450,749	18,281,450
Total	1,138,327	30,818,629	20,969,094

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

Appendix Two: Crop Types

Table 2.1: Outdoor Fruit Production (Fresh, Processing & Organic combined) in Ireland in 2004

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): Outdoor Fruit Production (Fresh, Processing & Organic combined) in Ireland in 2008

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	-	€0	€0	-
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 2.1 (continued): Outdoor Fruit Production (Fresh, Processing & Organic combined) in Ireland in 2012

2012				
	Total Hectares	Estimated Value (€)	Estimated Value per Hectare €	Total Growers
Outdoor Strawberries	15.3	€537,242	€35,022	19
Outdoor Raspberries	4.7	€87,594	€18,797	14
Outdoor Blackcurrants	114.0	€383,386	€3,364	11
Outdoor Blueberries				2
Outdoor Tayberries	0.7	€9,660	€14,418	3
Outdoor Gooseberries	1.1	€24,135	€21,941	7
Outdoor Blackberries				1
Other Outdoor Fruits	2.2	€14,610	€6,522	6
Total Outdoor Fruits**	148.8	€1,138,327	€7,651	38

Some figures 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: Protected Fruit Production in Ireland in 2004

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): Protected Fruit Production in Ireland in 2008

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 2.2 (continued): Protected Fruit Production in Ireland in 2012

2012												
	Glasshouse	Fixed Poly Tunnels	Mobile Tunnels	Cloches/low Tunnels	Total	Glasshouse	Fixed Poly Tunnels	Mobile Tunnels	Cloches/low Tunnels	Total**	Estimated Value	Value per Hectare
	Hectares	Hectares	Hectares	Hectares	Hectares	Growers	Growers	Growers	Growers	Growers	€	€
Protected Strawberries	41.8	86.6	15.8	9.0	153.3	19	41	4	6	47	€27,801,518	€181,341
Protected Raspberries		15.3	2.3	-		2	11	5	-	15		
Other Protected Fruits		9.2	1.7	-		3	6	6	-	11		
Total Protected Fruits	44.1	111.1	19.8	9.0	184.1	22	43	9	6	51	€30,818,629	€167,398

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: Protected Vegetable Production in Ireland in 2004

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): Protected Vegetable Production in Ireland in 2008

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 2.3 (continued): Protected Vegetable Production in Ireland in 2012

2012												
	Glasshouse	Fixed Poly Tunnels	Mobile Tunnels	Cloches/low Tunnels	Total	Glasshouse	Fixed Poly Tunnels	Mobile Tunnels	Cloches/low Tunnels	Total*	Estimated Value	Value per Hectare
	Hectares	Hectares	Hectares	Hectares	Hectares	Growers	Growers	Growers	Growers	Growers	€	€
Tomatoes standard	4.0	0.2	-	-	4.2	9	17	-	-	26	€2,241,122	€529,082
Tomatoes vine			-	-	3.4	4	6	-	-	10	€2,362,915	€698,240
Tomatoes cherry	1.6	0.3	-	-	1.9	6	21	-	-	27	€2,112,266	€1,126,992
Tomatoes other			-	-	0.4	1	2	-	-	3	€145,200	€333,793
Total Tomatoes	9.4	0.6	-	-	9.9	13	25	-	-	38	€6,861,503	€691,041
Lettuce butterhead	110.9	0.6	-	-	111.5	15	11	-	-	25	€5,700,736	€51,135
Lettuce continental	5.8	0.2	-	-	6.0	5	11	-	-	16	€305,722	€50,773
Lettuce other	-		-	-		-	1	-	-	1		
Total Lettuce	116.7	0.8	-	-	117.5	15	17	-	-	31	€6,007,058	€51,117
Peppers		0.0	-	-	4.8	2	8	-	-	10	€3,248,517	€672,306
Cucumbers	7.9	0.1	-	-	8.0	4	17	-	-	21	€1,405,384	€176,051
Celery		0.1	-	-	0.5	1	6	-	-	7	€124,916	€260,948
Herbs	24.6	2.6	-	-	27.3	7	17	-	-	23	€2,495,691	€91,481
Salad leaaves		1.3	-	-	4.0	1	26	-	-	27	€454,459	€113,016
Other food crops	8.1	4.8	4.9	-	17.8	16	28	1	-	41	€371,566	€20,882
Total Protected	174.6	10.3	4.9	-	189.8	43	36	1	-	72	€20,969,094	€110,461

* 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 in Ireland by County in 2012

	Hectares			Growers			Estimated Total Value (€)		
	Strawberries	Raspberries	Minor Fruits**	Strawberries	Raspberries	Minor Fruits**	Strawberries	Raspberries	Minor Fruits**
Carlow				2	2	1			
Cavan	-	-	-	-	-	-	-	-	-
Clare	-	-	-	-	-	-	-	-	-
Cork	3.0		-	6	2	-	€710,100		-
Donegal	-	-	-	-	-	-	-	-	-
Dublin	61.7	12.8	7.6	9	4	4	€14,828,958	€1,658,200	€599,960
Galway	-			-	1	1	-		
Kerry		-	-	1	-	-		-	-
Kildare		-		1	-	1		-	
Kilkenny				2	2	2			
Laois				3	3	1			
Leitrim	-	-		-	-	1	-	-	
Limerick	-	-	-	-	-	-	-	-	-
Longford		-	-	1	-	-		-	-
Louth	10.8	-	-	4	-	-	€871,975	-	-
Mayo	-	-	-	-	-	-	-	-	-
Meath	23.7			7	2	1	€3,234,555		
Monaghan		-	-	1	-	-		-	-
Offaly				2	1	2			
Roscommon	-	-		-	-	1	-	-	
Sligo	-	-	-	-	-	-	-	-	-
Tipperary				1	1	1			
Waterford		-		1	-	1		-	
Westmeath		-	-	1	-	-		-	-
Wexford	51.5	4.9	116.0	14	8	10	€6,118,796	€231,071	€451,346
Wicklow		-		1	-	2		-	
Total	168.7	24.5	139.8	57	26	29	€28,338,760	€2,230,805	€1,387,391

Some figures withheld to protect grower confidentiality.** Minor fruits are blackcurrants, blueberries, blackberries, gooseberries and other minor fruits.

Table 3.2: Protected Vegetable Production in Ireland by County in 2012

	Hectares								Growers							
	Tomatoes	Lettuce	Cucumbers	Celery	Herbs	Peppers	Salad leaves	Other	Tomatoes	Lettuce	Cucumbers	Celery	Herbs	Peppers	Salad leaves	Other
Carlow																
Cavan																
Clare																
Cork	0.2	7.7	0.0		0.2	0.0	0.7	0.7	12	7	8	1	10	7	15	13
Donegal																
Dublin	6.0	100.7						6.6	6	13	2	1	2	2	1	8
Galway	0.2	0.6	0.0		0.6			1.3	4	4	3	2	3	1	2	5
Kerry									1	1	1		1		1	2
Kildare																
Kilkenny																
Laois																
Leitrim									1	1		1			1	1
Limerick																
Longford																
Louth										1	1					2
Mayo																
Meath									1				1			1
Monaghan									1							
Offaly									1		1	1			1	1
Roscommon									2	1	2	1	2		2	2
Sligo																
Tipperary																
Waterford									1							
Westmeath																
Wexford								4.9	2							1
Wicklow	0.2	0.2	0.0		9.1		0.3	0.3	6	4	3		4		4	5
Total	9.9	117.5	8.0	0.5	27.3	4.8	4.0	17.8	38	32	21	7	23	10	27	41

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

Table 3.2 (continued): Protected Vegetable Production in Ireland by County in 2012

	Estimated Total Value (€)							
	Tomatoes	Lettuce	Cucumbers	Celery	Herbs	Peppers	Salad leaves	Other
Carlow								
Cavan								
Clare								
Cork	€42,196	€218,690	€4,614		€20,505	€2,542	€108,275	€45,403
Donegal								
Dublin	€3,905,600	€5,306,394						€143,300
Galway	€22,545	€18,480	€5,360		€20,260			€26,811
Kerry								
Kildare								
Kilkenny								
Laois								
Leitrim								
Limerick								
Longford								
Louth								
Mayo								
Meath								
Monaghan								
Offaly								
Roscommon								
Sligo								
Tipperary								
Waterford								
Westmeath								
Wexford								
Wicklow	€18,970	€13,734	€1,175		€1,353,300		€27,980	€14,160
Total	€6,861,503	€6,007,058	€1,405,384	€124,916	€2,495,691	€3,248,517	€454,459	€371,566

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

Appendix Four: Protected Structure Area

Protected Structure Area in Ireland by County in 2013

	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	-	-		1
Cavan	-	-	-	-
Clare	-	-	-	-
Cork		2	7.2	23
Donegal	-	-	-	-
Dublin	72.0	32	49.8	8
Galway		2	0.7	4
Kerry		2	2.8	3
Kildare		1		1
Kilkenny		1		2
Laois	-	-	3.7	3
Leitrim	-	-		1
Limerick	-	-	-	-
Longford	-	-		1
Louth	6.8	3	10.6	4
Mayo	-	-	-	-
Meath	3.0	5	21.5	6
Monaghan		1	-	-
Offaly	-	-		1
Roscommon	-	-		2
Sligo	-	-	-	-
Tipperary	-	-		1
Waterford		1		2
Westmeath		1		1
Wexford	7.1	7	27.3	12
Wicklow	1.1	3	2.6	5
Total	99	61	134	81

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

Appendix Five: Employment

Table 5.2: Soft Fruit and Protected Vegetable Employment in Ireland by County in 2013

	Outdoor and Protected Soft Fruits				Protected Vegetables		
	Full-time	Part-time	Full-time Equivalent	Seasonal Pickers	Full-time	Part-time	Full-time Equivalent
Carlow					-	-	-
Cavan	-	-	-	-	-	-	-
Clare	-	-	-	-	-	-	-
Cork	8	8	2	58	23	22	6
Donegal	-	-	-	-	-	-	-
Dublin	121	321	160	30	185	151	75
Galway	1	0	-		6	5	3
Kerry							
Kildare					-	-	-
Kilkenny					-	-	-
Laois	4	4	1	18	-	-	-
Leitrim							
Limerick	-	-	-	-	-	-	-
Longford					-	-	-
Louth	7	48	11.0	8	13	8	3
Mayo					-	-	-
Meath	9	105	50	10	9	-	-
Monaghan							
Offaly		7	1.4	21	3	-	-
Roscommon							
Sligo	-	-	-	-	-	-	-
Tipperary							
Waterford							
Westmeath					-	-	-
Wexford	47	81	25	173	11	13	5
Wicklow					20	10	2
Total	219	614	261	439	284	229	102

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

Appendix Six: Storage Facilities

Table 6.1: Storage Capacity among Soft Fruit and Protected Vegetable Growers in Ireland in 2013

2012		
	Area/Volume	Growers*
Pack-House	27,835 square metres	109
Cold Storage	34,317 cubic metres	102
Other Storage	13,844 cubic metres	31

* Total growers = 137.

Table 6.2: Storage Capacity among Soft Fruit and Protected Vegetable Growers in Ireland by County in 2013

	Pack-House Square Metres	Cold Storage Cubic Metres	Other Storage Cubic Metres
Carlow			
Cavan	-	-	-
Clare	-	-	-
Cork	722	377	50
Donegal	-	-	-
Dublin	16,437	26,325	3,107
Galway	420	241	20
Kerry	220	24	-
Kildare			
Kilkenny			
Laois	75	167	43
Leitrim			
Limerick	-	-	-
Longford			
Louth	1,443	904	1,088
Mayo	-	-	-
Meath	1,700	1,508	5,989
Monaghan			
Offaly	578	94	-
Roscommon			
Sligo	-	-	-
Tipperary			
Waterford			
Westmeath			
Wexford	2,733	1,897	1,816
Wicklow	1,372	925	610
Total	27,835	34,317	13,843

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