

National Amenity Census 2011



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

National Amenity Census 2011

Introduction

The amenity sector consists of hardy nursery stock, bedding/pot plants, bulbs, cut flowers, cut foliage and turf grass. The 2011 Amenity Census involved a total of 244 amenity producers and provides information regarding production, employment, production facilities and business development issues. The census was conducted in 2011, asking growers to provide details of amenity production in the previous year (**i.e. all figures are for 2010**). Comparisons are made with data from previous censuses where available: a census of nursery stock producers was previously conducted in 2007; while the 2008 Soft Fruit & Protected Crops census included bedding/pot plants producers. For the first time, the 2011 Amenity Census includes data for turf grass, hedging, bulbs, outdoor cut flowers, cut foliage and protected cut flowers.

The list of producers surveyed was drawn up from information available within the Department of Agriculture, Food and the Marine (DAFM). All producers surveyed had a production area of at least 0.04Ha. in the case of outdoor production or 400m² in the case of protected production. In the case of producers that had outdoor and protected production but only met the minimum threshold for one of these two production categories the entire business was still included in the census. The data for the census was collected by DAFM personnel and analysis was guided by Bord Bia and DAFM.

Bord Bia and DAFM wish to thank all amenity producers and Teagasc personnel involved for their co-operation in compiling this census.

Executive Summary

The amenity sector consists of hardy nursery stock, bedding/pot plants, bulbs, cut flowers & cut foliage and turf grass. There are 244 amenity plant producers, providing 1,144 full-time equivalent jobs. The production value of the sector in 2010 is €47.6 million.

Hardy Nursery Stock

Hardy nursery stock plants include deciduous/coniferous trees, ornamental plants (e.g. shrubs, roses) and hedging. There are 171 hardy nursery stock producers in 2010. Most of the production area is in open fields/open ground, rather than under protection. Production area in 2010 is 731 hectares, of which 43% is in Tipperary. Production value of hardy nursery stock is €29.9 million.

Large-scale producers have a high share of production value - of the 171 hardy nursery stock producers, the largest five account for 46% of total area.

Bedding/Pot Plants

There are 94 bedding/pot plant producers in 2010, with a combined production area of 58 hectares and production value of €12.9 million. Both production area and value have decreased since the most recent protected crop census in 2008. Geraniums are the most important bedding/pot plant in terms of value, followed by pansies and begonias. Forty percent (40%) of bedding/pot plant production area is in Cork.

Of the 94 producers, the largest five producers account for 59% of production area.

Bulbs, Cut Flowers & Cut Foliage

Cut flowers production is primarily daffodils, while cut foliage includes plants such as eucalyptus and pittosporum. There are 39 cut flower/cut foliage producers in 2010, with a combined production area of 357 hectares and production value of €3.7 million. The main counties for daffodil production are Cork and Kilkenny (together

accounting for 66% of daffodil production area), while the main county for cut foliage production is Wexford (64% of cut foliage production area).

Turf Grass

There are 10 producers of turf grass in 2010, with a combined production area of 196 hectares and production value of €1.1 million. Turf grass production is primarily in Leinster (73% of turf grass production area).

Imports/Exports, Sales Channels, Business Development & Producer Profile

Amenity producers imported €13.4 million and exported €8.7 million of plants/amenity material in 2010. The main source country for imports is the Netherlands, from which €9.2 million of plants was imported. The primary export market is to Great Britain (€4.6 million of plants exported), followed by cross-border exports to Northern Ireland (€1.6 million).

Other retail garden centres are the most important sales channel for home-market sales, accounting for 29% of total sales value. Sixteen percent (16%) of sales value is to landscapers, while 13% is through producers' own garden centres.

Among the business challenges for amenity producers are low margins (in part caused by low cost imports) and the availability of finance. Weather issues (causing plant loss/damage), the economy (reduced consumer demand) and labour costs are also factors. Sixteen percent (16%) of producers participate in a quality assurance scheme, and 41% have a website/use the internet as a sales medium. The average age of owners of amenity businesses is 53.

For further information contact:

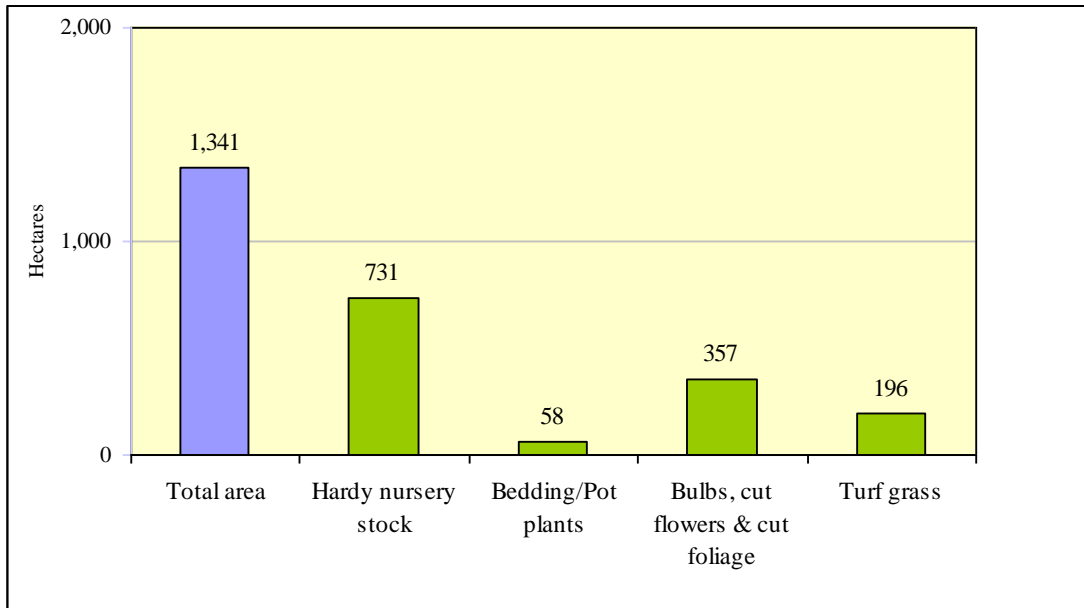
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Summary Data for Amenity Sector

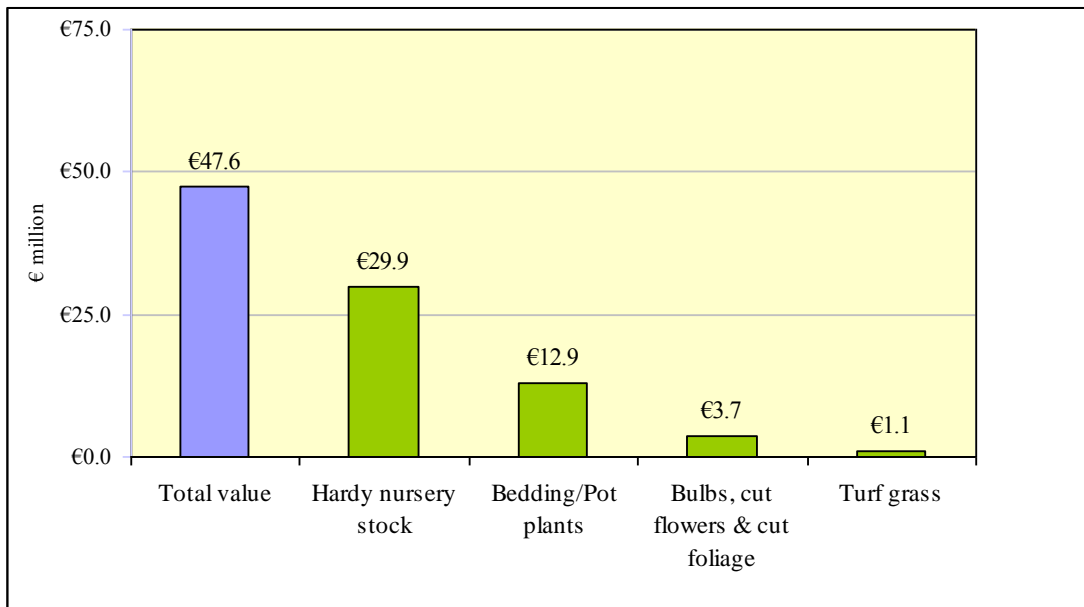
This section provides combined data for the four sub-sectors within the amenity sector (i.e. hardy nursery stock; bedding/pot plants; bulbs, cut flowers & cut foliage; and turf grass). There are 244 amenity plant producers in 2010 with a total production area of 1,341 hectares. The total production value is €47.6 million, and the sector employs 1,144 full-time equivalent jobs.

Amenity Sector Production Area 2010 (Hectares)



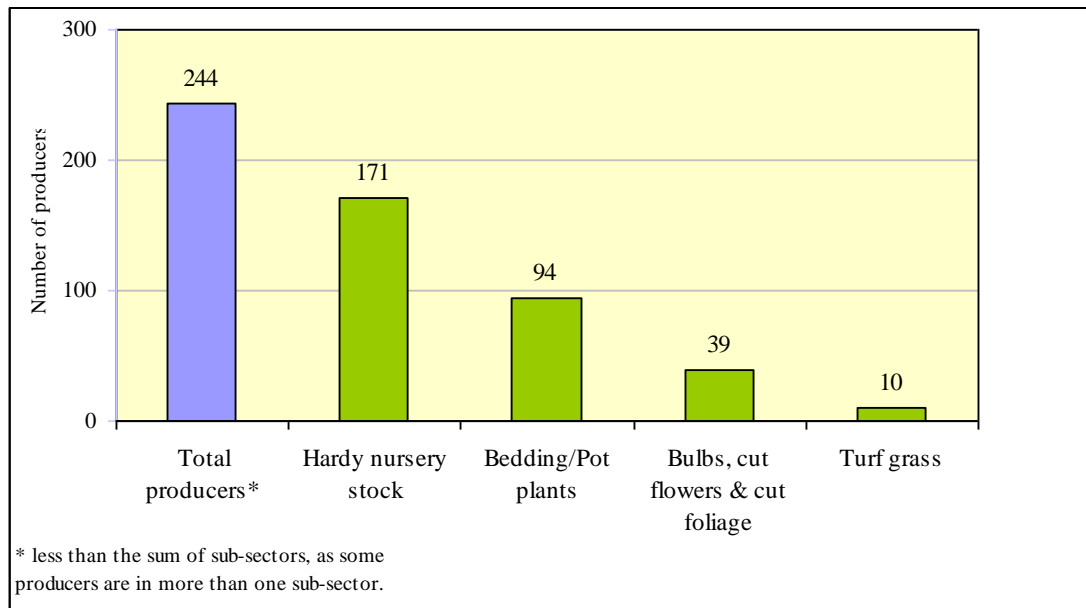
The production area for the amenity sector in 2010 is 1,341 hectares. *Hardy nursery stock* production area is 731 hectares, representing 55% of the total.

Amenity Sector Production Value 2010 (€ million)



The production value for the amenity sector in 2010 is €47.6 million. The production value for *hardy nursery stock* is €29.9 (63% of total value), *bedding/pot plants* are €12.9 million (27%), *bulbs, cut flowers & cut foliage* are €3.7 million (8%), and *turf grass* is €1.1 million (2%).

Number of Amenity Sector Producers 2010

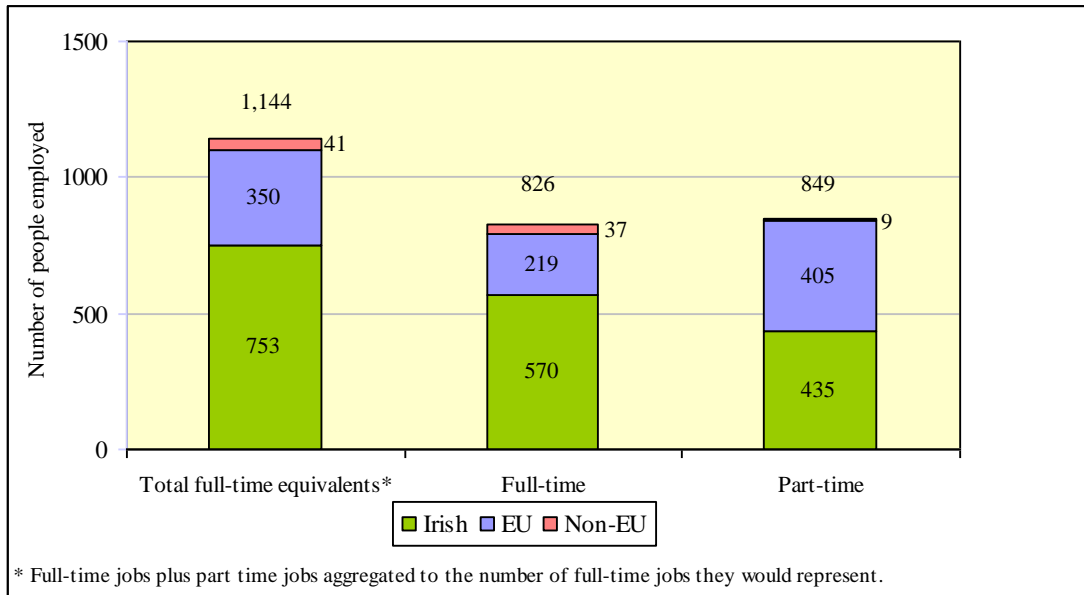


There are 244 amenity producers in 2010. *Hardy nursery stock* has the highest number of producers at 171, followed by *bedding/pot plants* (94 producers), *bulbs, cut flowers & cut foliage* (39 producers), and *turf grass* (10 producers).

Some producers are in more than one sub-sector, but these tend to be the smaller producers. The larger producers within each sub-sector tend to specialise. For example:

- None of the top-20 (by area) *hardy nursery stock* producers are involved in any other sub-sector
- None of the top-5 *daffodil* producers, and only one of the top-10 *cut foliage* producers are involved in any other sub-sector within the amenity sector
- None of the 10 *turf grass* producers are involved in any other sub-sector
- *Bedding/pot plants* are the one exception, with 14 of the top-20 producers involved in other sub-sectors. However, their production area in these other sub-sectors tends to be less than 10% of their bedding/pot plants area (i.e. they are mostly specialised in bedding/pot plants).

Amenity Sector Employment 2010



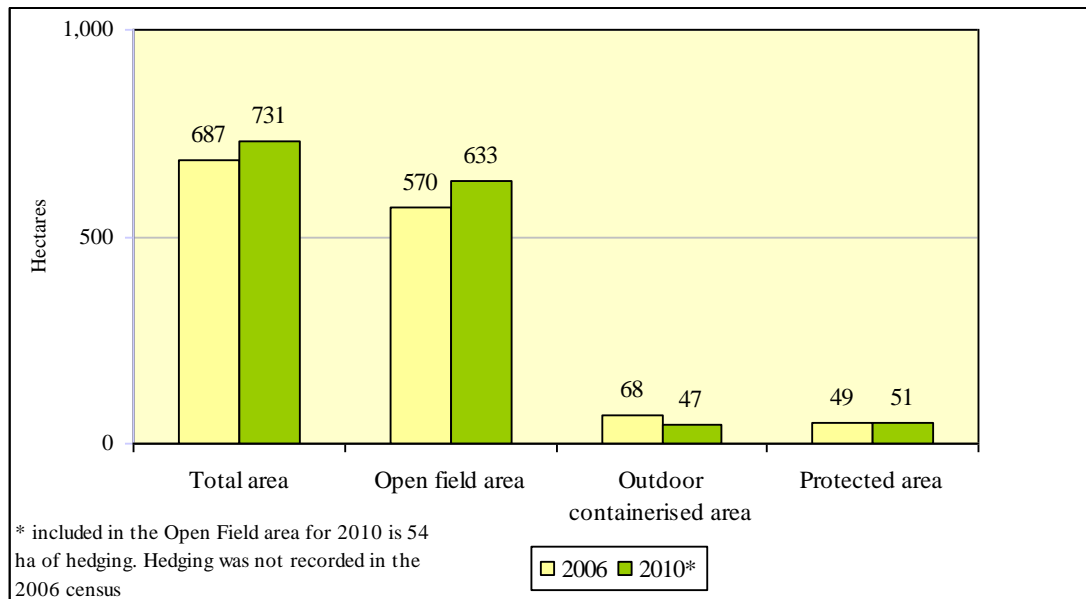
The amenity sector employs 826 people full-time and 849 part-time, representing a total of 1,144 full-time equivalent jobs.

Section 1

Hardy Nursery Stock Sector

The hardy nursery stock sector includes plants such as shrubs, roses and trees. It is the biggest sub-sector within the overall amenity sector in terms of production area, value and number of growers. Most of the production area is in open fields/open ground. The main plant categories in terms of value are outdoor deciduous trees and outdoor ornamental plants (e.g. shrubs, roses, herbaceous perennials), both of which have a production value of over €8 million. Tipperary has the highest production area of hardy nursery stock, followed by Kildare and Cork.

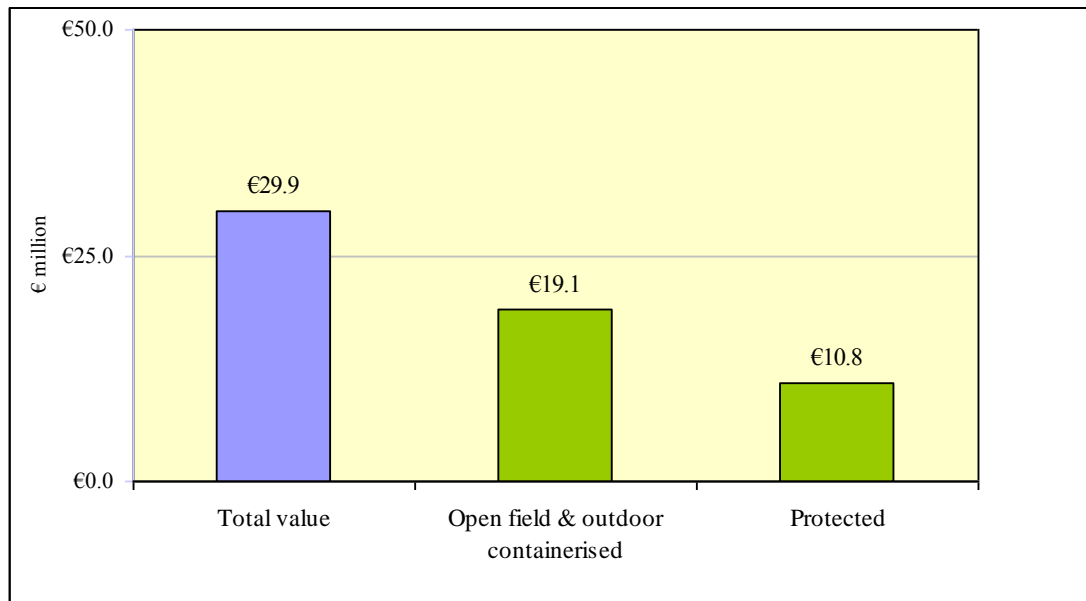
Hardy Nursery Stock Production Area 2006-2010 (Hectares)



The total production area for hardy nursery stock in 2010 is 731 hectares. The open field area includes 54 hectares of hedging, which was not included in the 2006 census. When the production area for hedging is excluded, total production area is virtually unchanged from 2006.

Note: the 2006 figures are slightly lower than those shown in the 2006 Hardy Nursery Stock census report. This is because the 2006 report included production area for bedding/pot plants (2.1 ha in Outdoor Containerised and 2.1 ha also in Greenhouses). Information for bedding/pot plants is shown in a later section of this report.

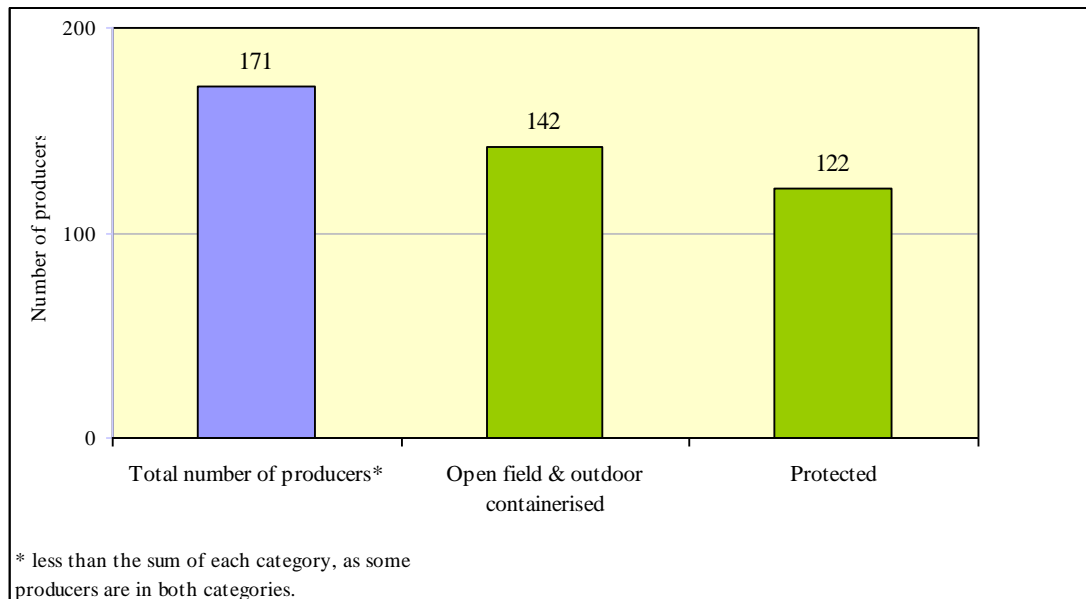
Hardy Nursery Stock Production Value 2010 (€ million)



The production value of hardy nursery stock in 2010 is €29.9 million. The value of outdoor production is €19.1 million (64% of total value), and the value of protected production is €10.8 million (36% of total value).

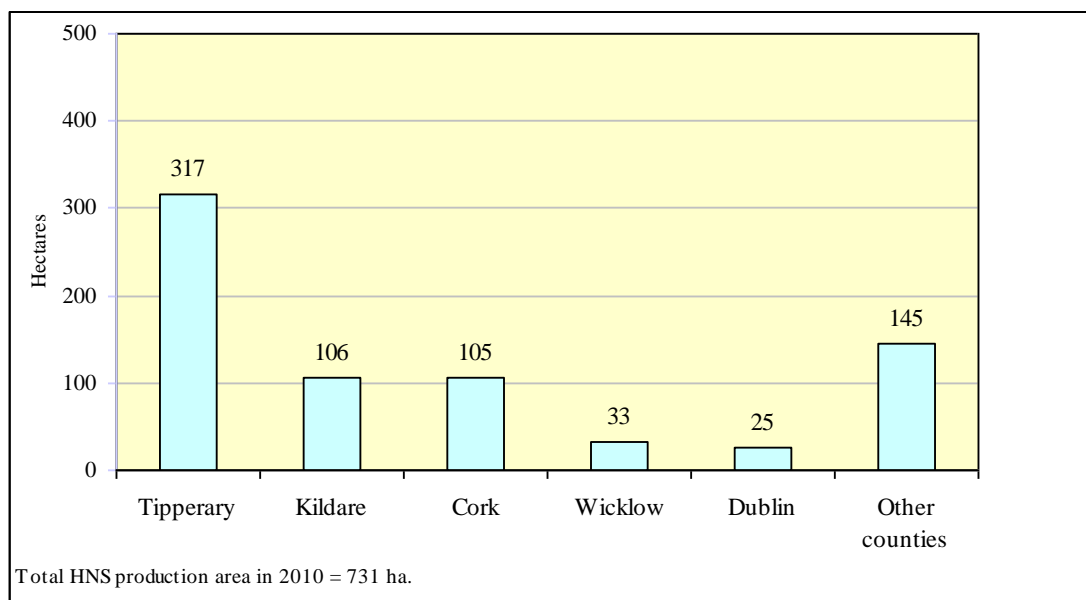
Note: comparisons to 2006 production value are not available, as 2006 figures included bedding/pot plant production value.

Number of Hardy Nursery Stock Producers 2010



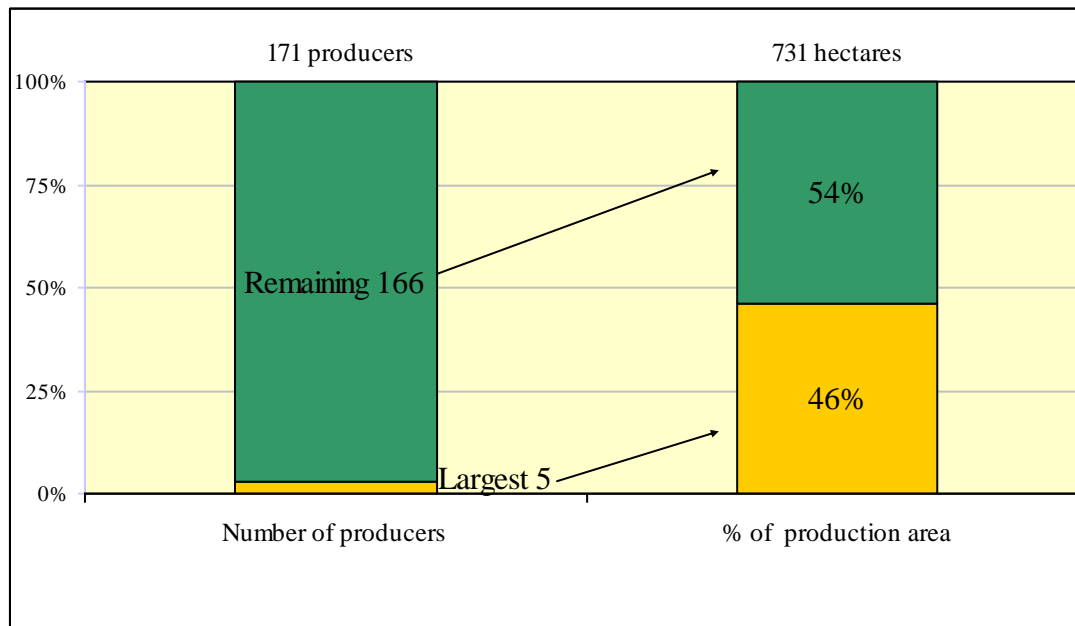
There are 171 hardy nursery stock producers in 2010. There are 142 producers in open field/outdoor containerised production and 122 producers in protected production.

Hardy Nursery Stock Production Area 2010 (Hectares) by county



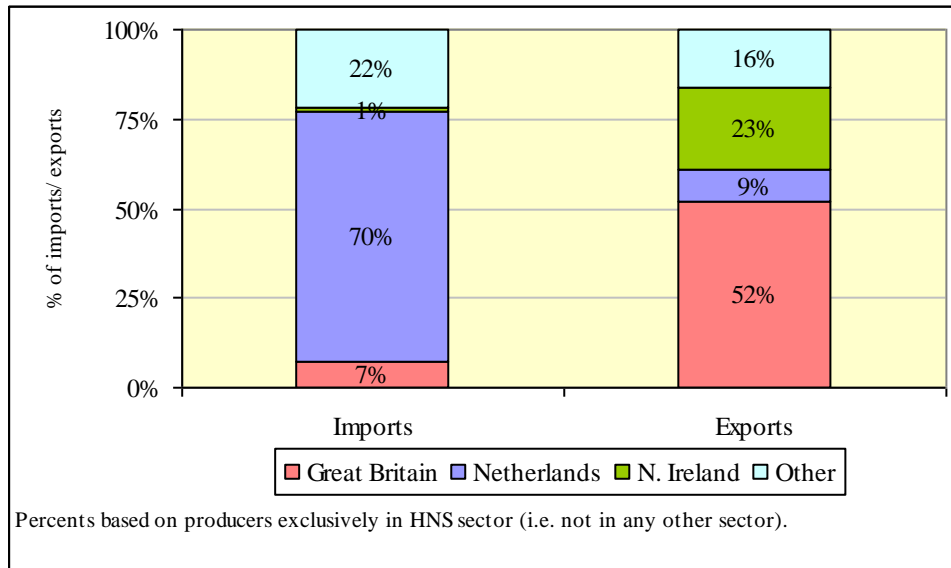
Tipperary has the highest production area of hardy nursery stock with 317 hectares in 2010, representing 43% of total hardy nursery stock area.

Contribution of Largest Hardy Nursery Producers by Area in 2010



Large-scale hardy nursery stock producers account for a high proportion of the overall production area. Of the 171 producers, the largest five producers (in terms of output area) account for 46% of total hardy nursery stock production area.

Hardy Nursery Stock Imports/Exports 2010



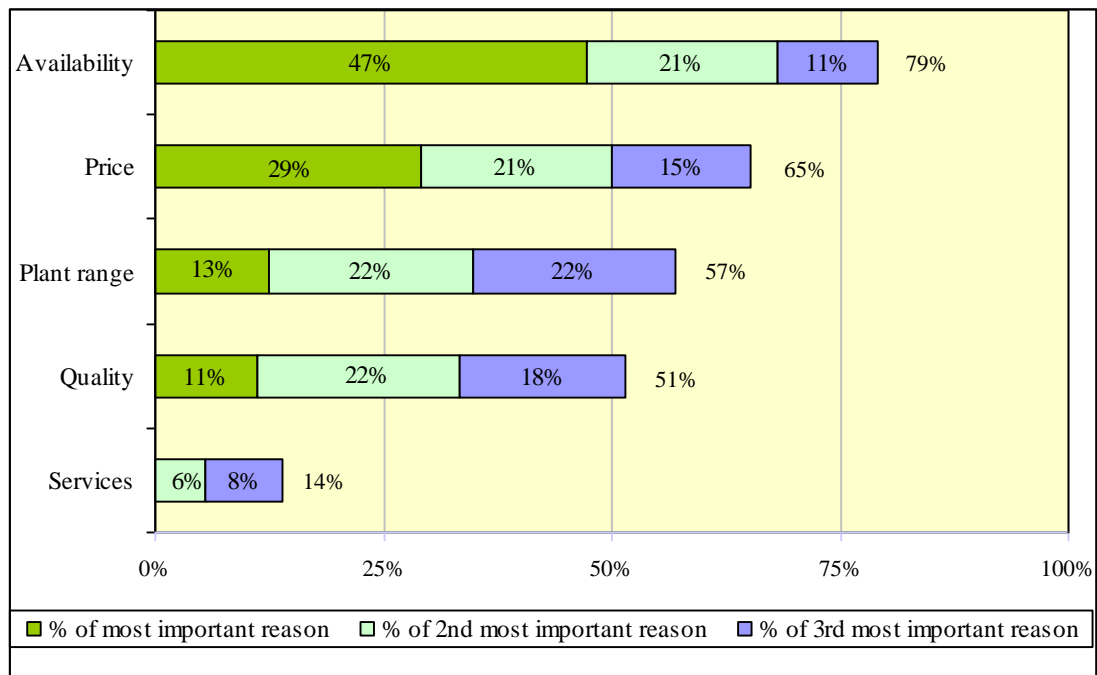
The estimated value of imports of plants/amenity material into Irish nurseries by hardy nursery stock producers in 2010 is €9.3 million. This import value excludes direct imports of plants/amenity material by retail garden centres. Exports of plants/amenity material by hardy nursery stock producers in 2010 are estimated to be €6.1 million*.

Imports are primarily from the Netherlands (70%), with 7% being from Great Britain. (Among the 22% 'other' countries, the most significant are France and Belgium). Exports are primarily to Great Britain (52%), with a further 23% being to Northern Ireland.

* Census questionnaire asked producers for the total value of their imports and exports. As some producers operate in more than one amenity sub-sector, values for individual sub-sectors have to be estimated. Section 6 shows import/export value for the entire amenity sector.

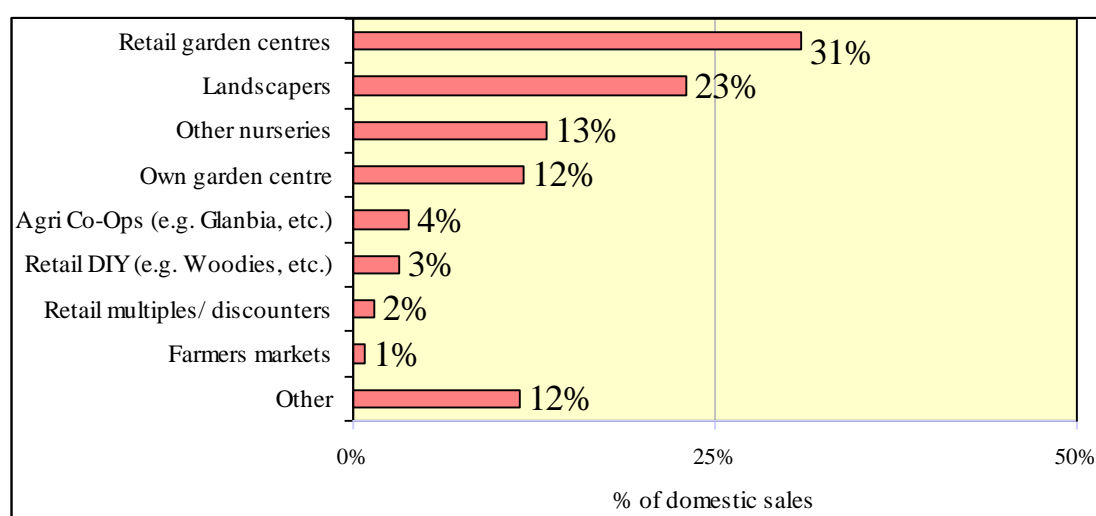
Reasons for Importing Plants/Amenity Material

(Among Hardy Nursery Stock Producers)



Among hardy nursery producers who imported plants or amenity materials onto their nurseries in 2010, the most common reason for importing is *availability* (rated the most important reason by 47% and in the top three reasons for importing by 79% of producers who imported). Note: a definition for *availability* was not specified in the census but it is likely to have been interpreted as covering issues such the availability of required plant species to the right specification, quantities and price.

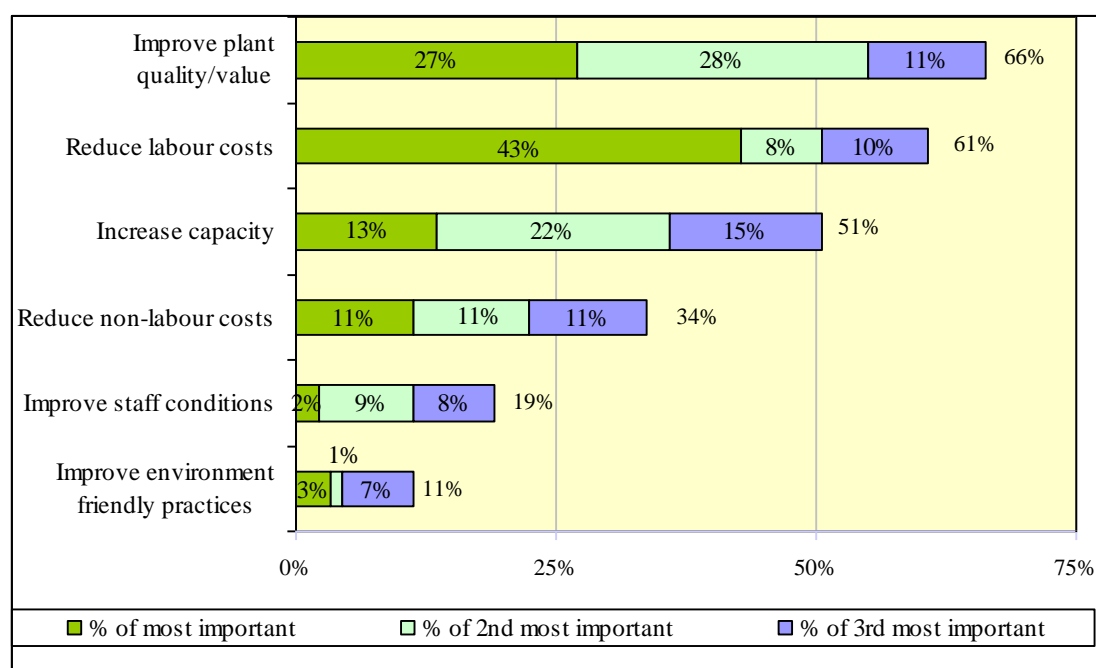
Channel Share of Hardy Nursery Stock Home Market Sales



31% of hardy nursery stock domestic sales value is to retail garden centres, 23% is to landscapers, while 13% is to other nurseries.

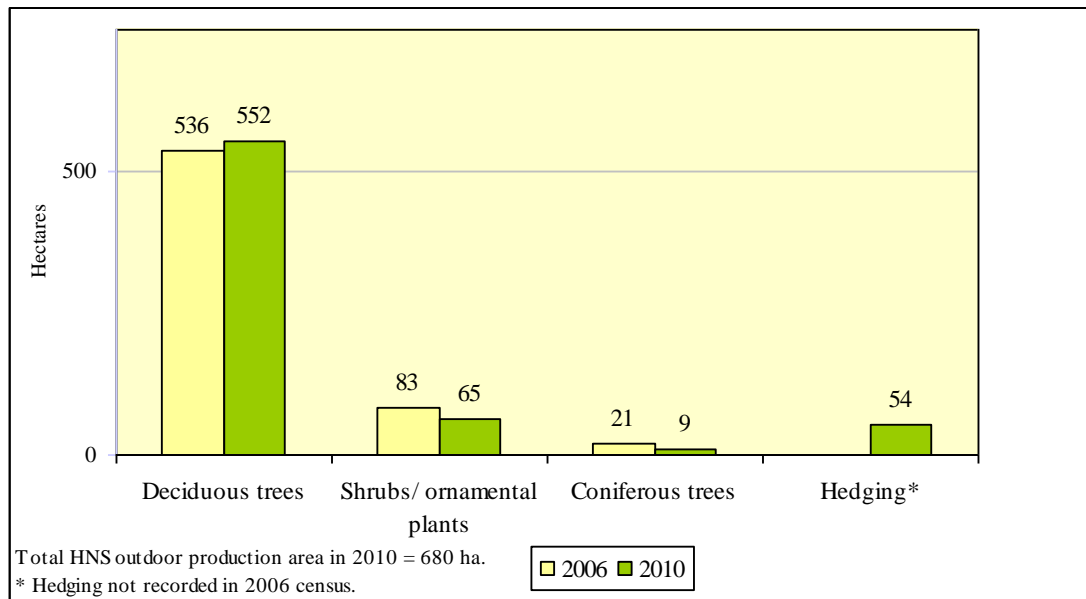
Priorities for Investment & Development

(Among Hardy Nursery Stock Producers)



Improving plant quality/value and *reducing labour costs* are the main priorities for hardy nursery stock producers. *Improving plant quality/value* was rated the most important priority by 27% of producers and a top-three priority by 66%. Reducing labour costs was the most important priority for 43% and a top-three priority for 61%.

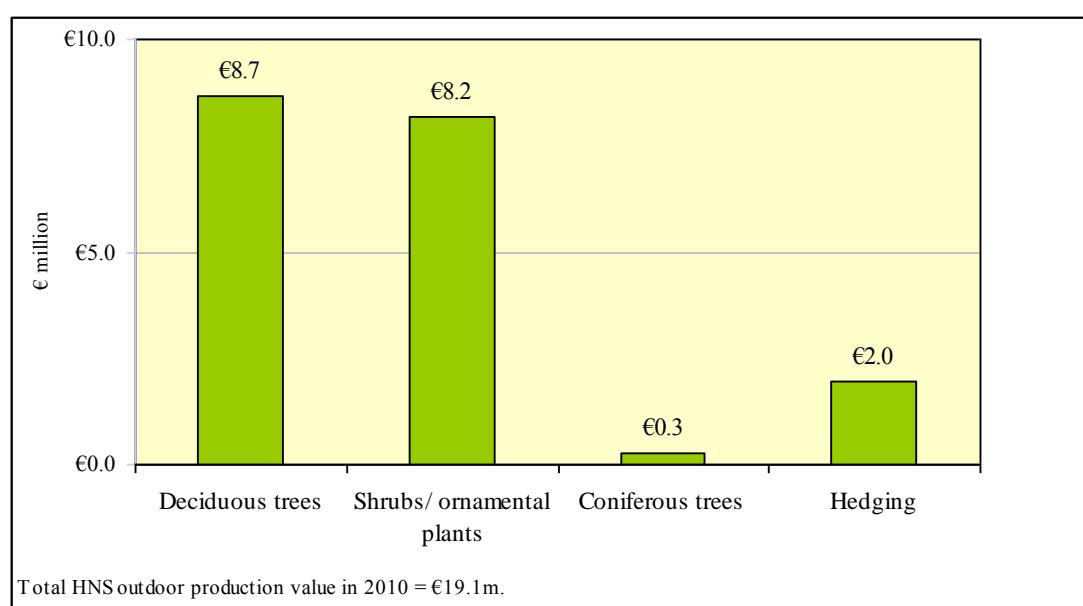
Hardy Nursery Stock Outdoor Production Area 2006-2010 (Hectares)



Deciduous trees account for most of the production area of outdoor hardy nursery stock, with a production area of 552 hectares in 2010.

Outdoor production area of *shrubs/ornamental plants* is 65 hectares in 2010, while that of *coniferous trees* is 9 hectares. Both show small declines as compared to the 2006 census. Production area of *hedging* is 54 hectares in 2010.

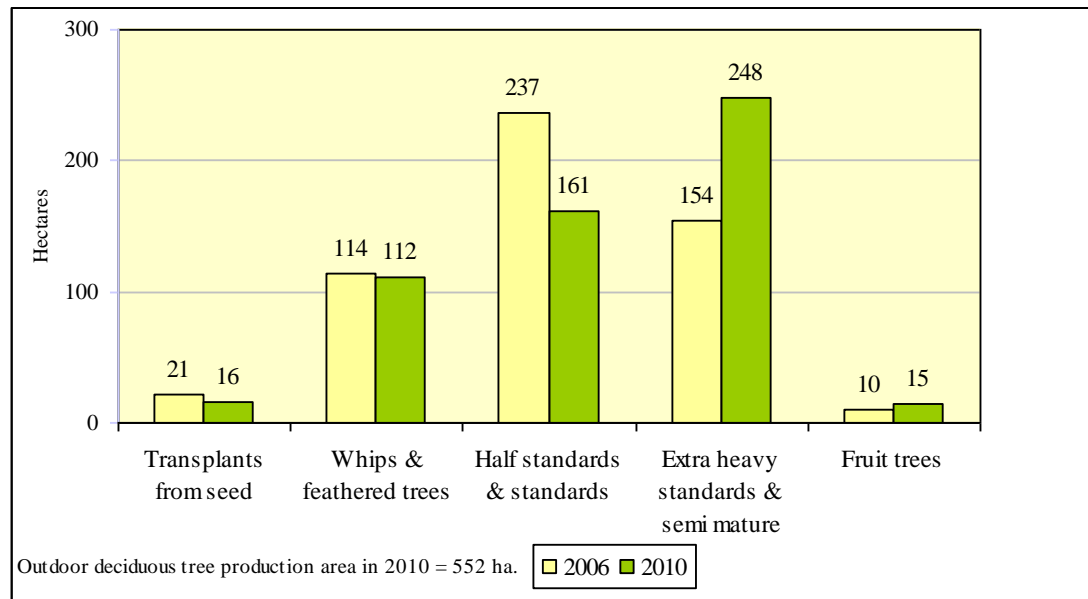
Hardy Nursery Stock Outdoor Production Value 2010 (€ million)



The production value of outdoor *deciduous trees* is €8.7 million in 2010. Of this, an estimated 80% is sold through the domestic market and 20% is exported. The main domestic sales channel is landscapers (approximately one-third of domestic sales). The main export market is Great Britain (estimated 45% of exports) and Northern Ireland (estimated 35% of exports).

The production value of outdoor *shrubs/ornamental plants* is €8.2 million in 2010. (note: there was insufficient data to calculate percentage of sales sold through the domestic market and exported).

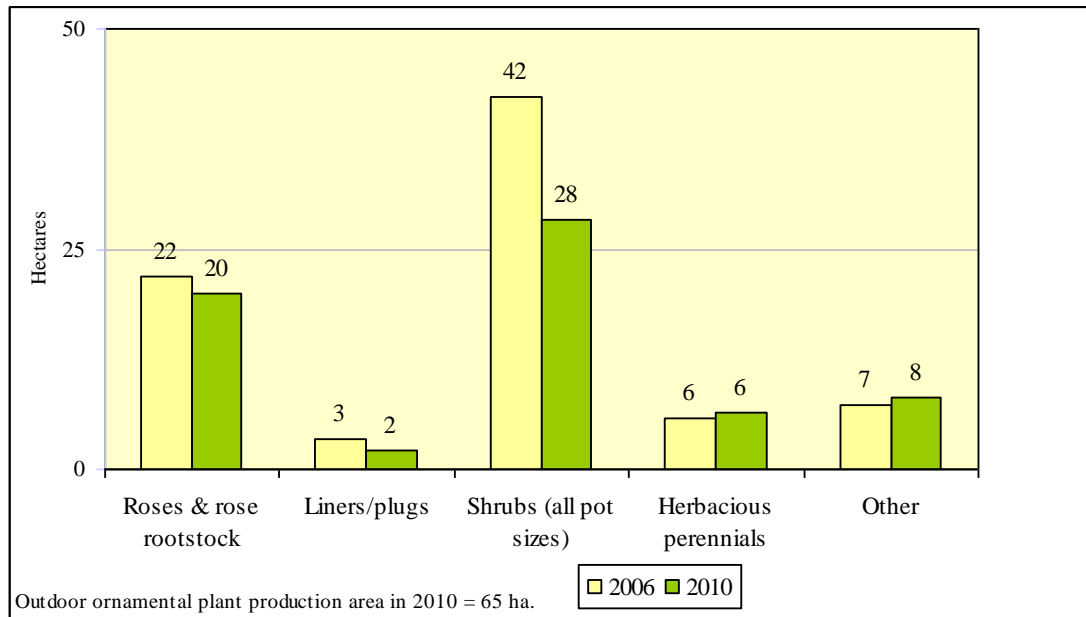
Hardy Nursery Stock Outdoor Deciduous Tree Production Area 2006-2010 (Hectares)



The production area of *transplants from seeds* and *whips & feathered trees* is similar to 2006. The production area for *half standard & standard trees* (i.e. 8-12cm.) has fallen, while that of *extra heavy standards & semi mature trees* has increased. This most likely represents the natural aging of stock coupled with the fall-off in demand for larger more expensive trees since 2006.

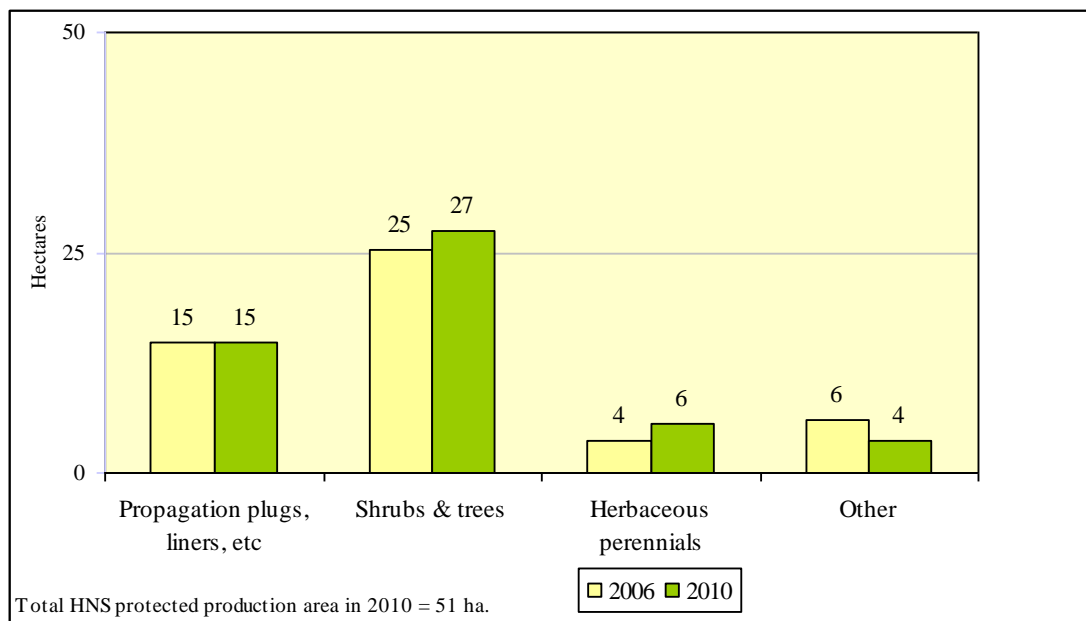
The census finding of relatively small declines in production area for transplants from seed as well as whips & feathered trees compared to the significant decline in production area for half standards & standards supports the view that many amenity producers are now focussing on producing lower cost trees (and/or plants) in light of the change in market conditions since the 2006 census.

Hardy Nursery Stock Outdoor Ornamental Plant Production Area 2006-2010
(Hectares)



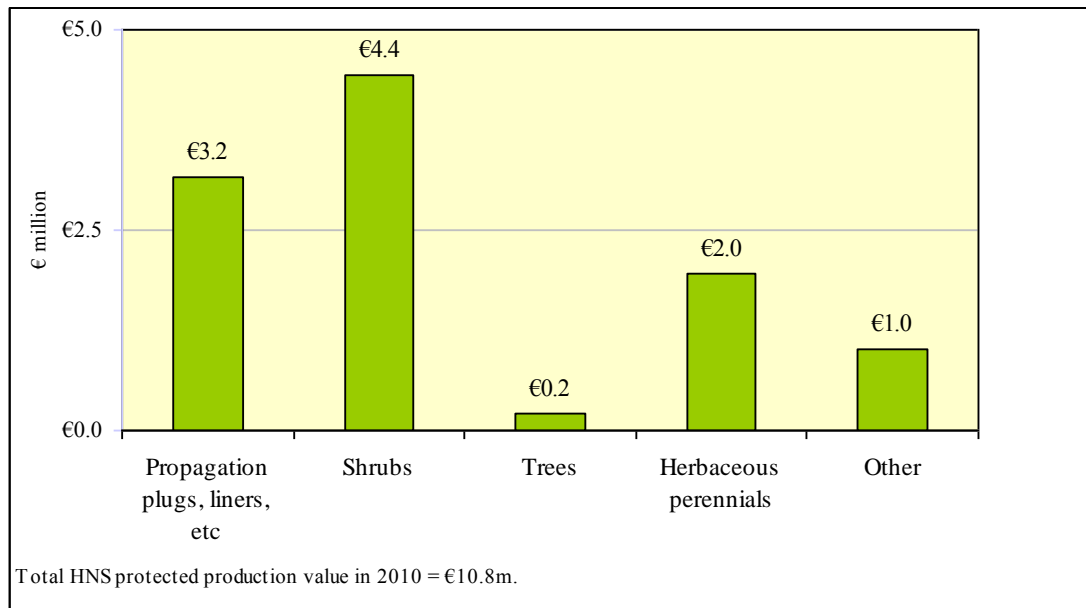
The production area of *shrubs* is 28 hectares in 2010, which is a 33% decrease from the 2006 census. Otherwise, there is little change in the production areas of outdoor ornamental plants. The significant decline in the production area for shrubs between 2006 and 2010 is considered to be due to growers reducing production and stock levels in light of the reduced demand for their plants combined with the severe frost in early 2010 that destroyed significant stocks of plants.

Hardy Nursery Stock Protected Production Area 2006-2010 (Hectares)



Production areas for most types of protected hardy nursery stock plants are similar to those of 2006.

Hardy Nursery Stock Protected Production Value 2010 (€ million)



The total production value of protected *shrubs* is €4.4 million in 2010. Of the combined (outdoor and protected) production value of *shrubs*, an estimated 65% is sold through the domestic market and 35% is exported. The main domestic sales channel is retail garden centres (estimated 60% of domestic sales). The main export market is Great Britain (estimated 67% of exports).

Protected *propagation plugs, liners, etc.* have a production value of €3.2 million, and protected *herbaceous perennials* have a production value of €2.0 million.

Section 2

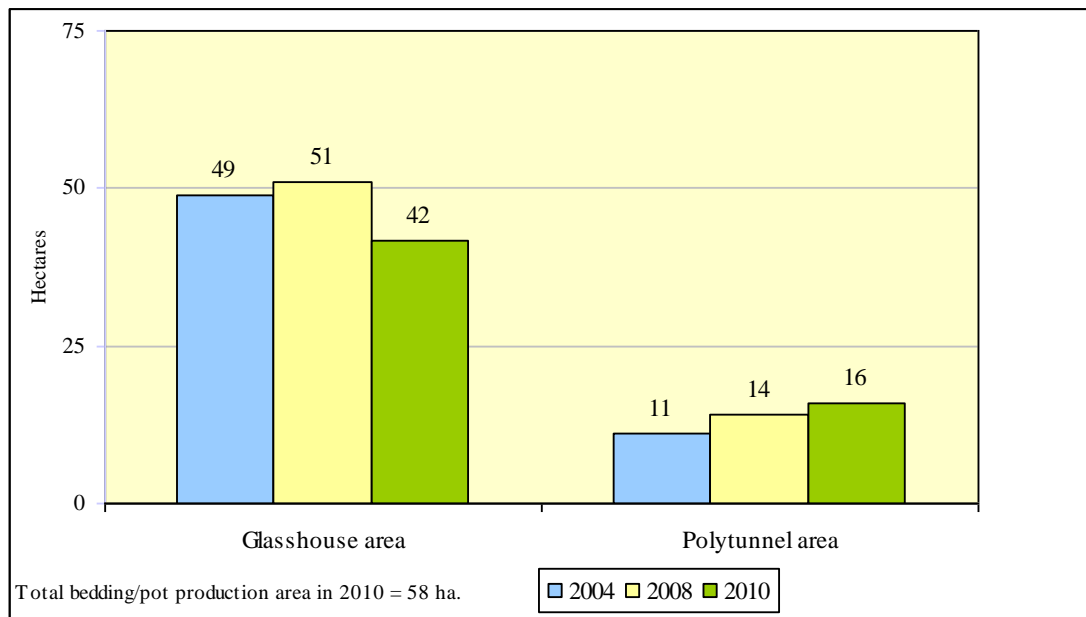
Bedding/Pot Plants Sector

Bedding/pot plants are grown under protection, primarily in glasshouses. Geraniums are the most important bedding/pot plants in terms of value, followed by pansies and begonias. However, both production area and production value have decreased since the most recent protected crop census in 2008.

The bedding/pot plant sector is dominated by larger growers. Of the 94 producers, the largest five producers (in terms of output area) account for 59% of production area.

Forty percent (40%) of bedding/pot plant production area is in Cork, while Wexford, Dublin and Meath also have significant production area.

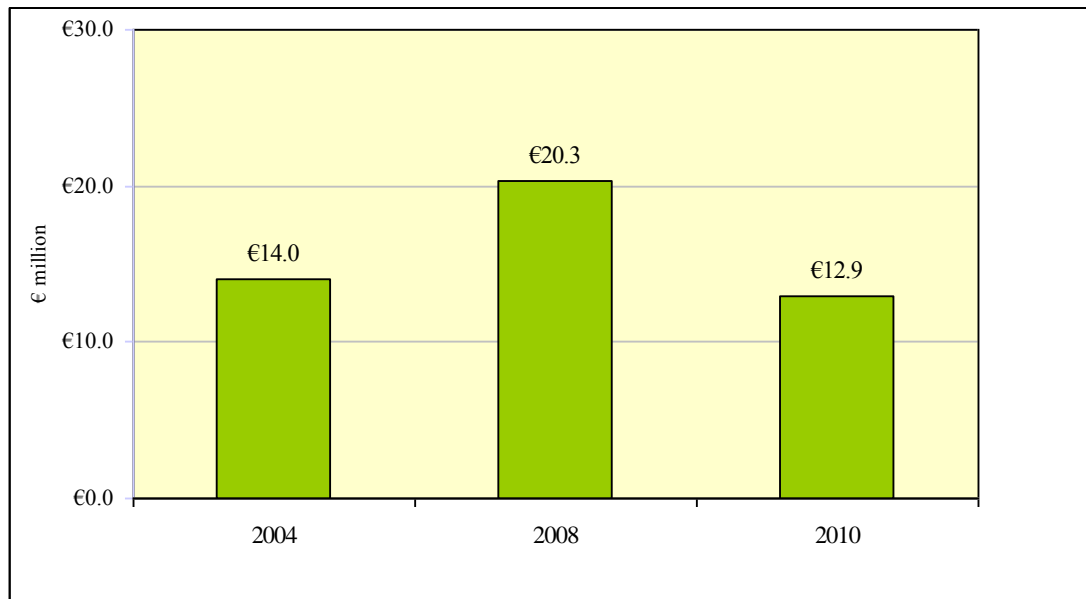
Bedding/Pot Plant Production Area 2004, 2008 & 2010 (Hectares)
by Protected Structure Type



Total (glasshouse + polytunnel) bedding/pot plant area is 58 hectares in 2010.

Glasshouse production area has fallen by 9 hectares since 2008, while polytunnel area is up by 2 hectares.

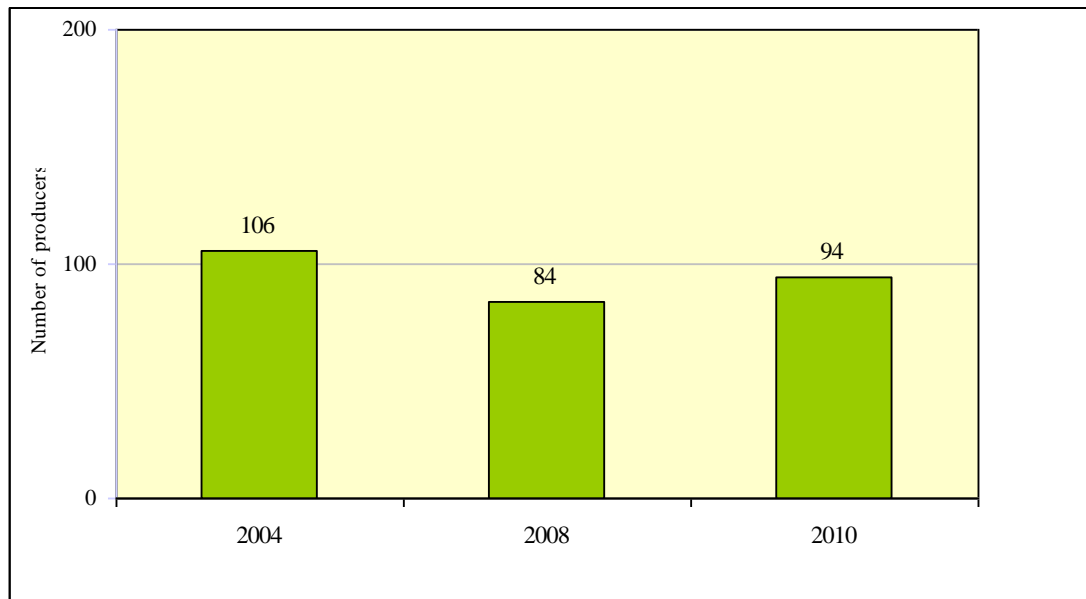
Bedding/Pot Plant Production Value 2004, 2008 & 2010 (€ million)



The value of bedding/pot plant production in 2010 is €12.9 million. This compares to €20.3 million in 2008 (i.e. a 36% decrease). The significant decrease in the value of bedding/pot plant output between 2008 and 2010 is considered to be due to three factors:

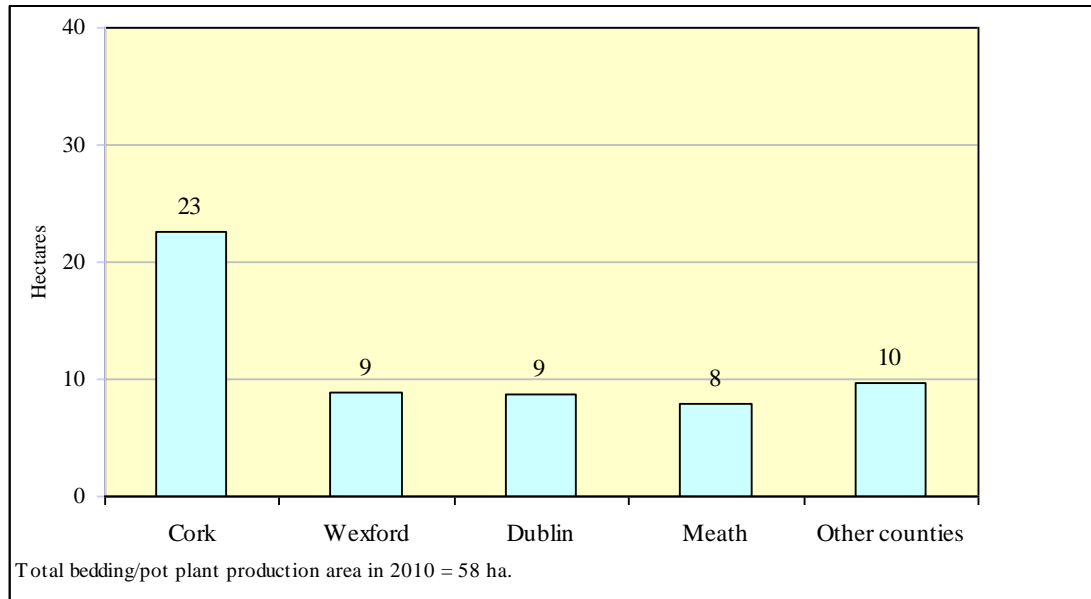
- The significant reduction in glasshouse production area
- Plant losses arising from the severe frost during 2010
- For many producers, the output value/price per unit declined between 2008 and 2010

Number of Bedding/Pot Plant Producers 2004, 2008 & 2010



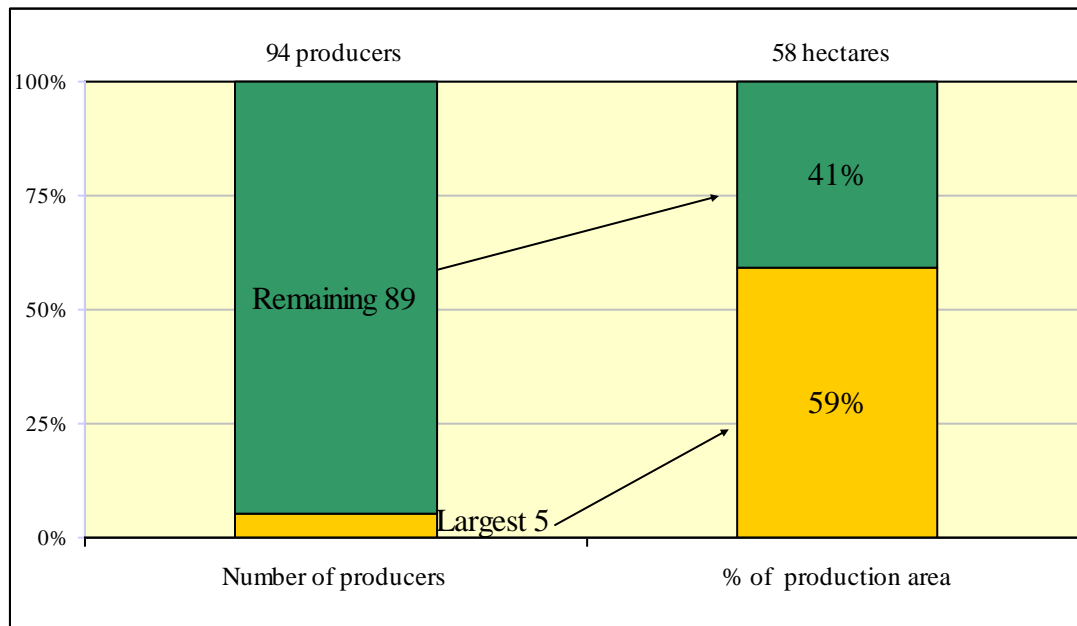
There are 94 bedding/pot plant producers in 2010, as compared to 84 in the 2008 census. The average bedding/pot plant production area has decreased (from 0.8 hectares in 2008 to 0.6 hectares in 2010). This suggest that the increase in producer numbers is either due to new small-scale producers or that some smaller scale producers were not included in the previous census.

Bedding/Pot Plant Production Area 2010 (Hectares) by County



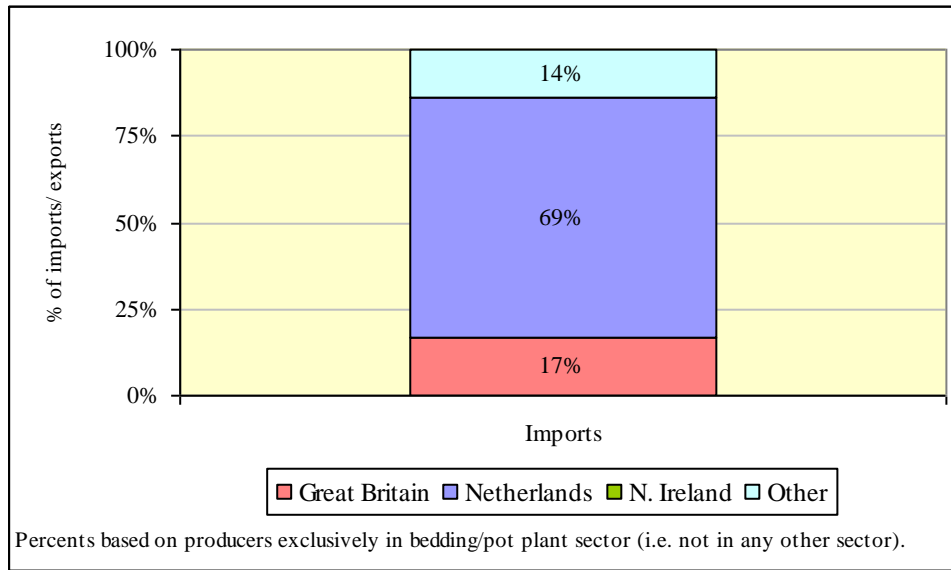
Cork has the highest production area of bedding/pot plants, with 23 hectares, representing 40% of total bedding/pot plant area. Wexford, Dublin and Meath also have significant production area. Within the other counties, most are in the east of the country (e.g. Louth and Wicklow, see appendix table 2.2).

Contribution of Largest Bedding/Pot Plant Producers by Area in 2010



As was the case in hardy nursery stock, large-scale producers account for a high proportion of the bedding/pot plant area. Of the 94 producers, the largest five producers (in terms of output area) account for 59% of total bedding/pot plant production area.

Bedding/Pot Plant Imports 2010



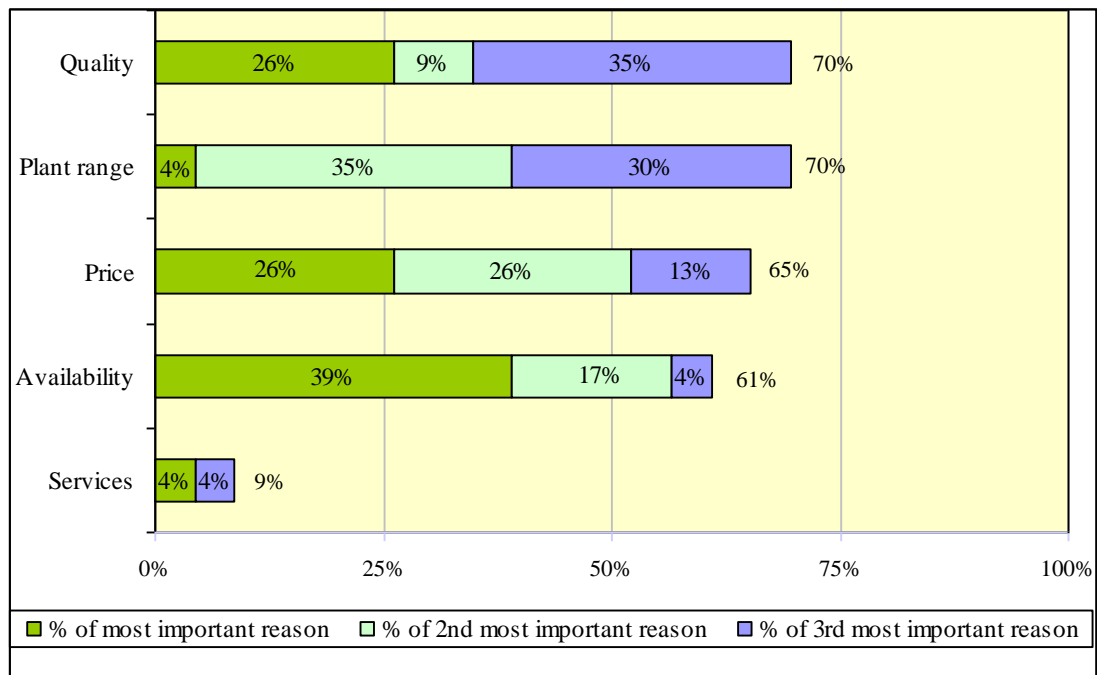
The estimated value of imports of plants/amenity material by bedding/pot plant producers in 2010 is €3.9 million*. The level of bedding/pot plant exports is small (estimated value €0.2 million, primarily to Northern Ireland).

Imports are primarily from the Netherlands (69%), with 17% being from Great Britain. (Among the 14% 'other' countries, the most significant are France and Denmark).

* Census questionnaire asked producers for the total value of their imports and exports. As some producers operate in more than one amenity sub-sector, values for individual sub-sectors have to be estimated. Section 6 shows import/export value for the entire amenity sector.

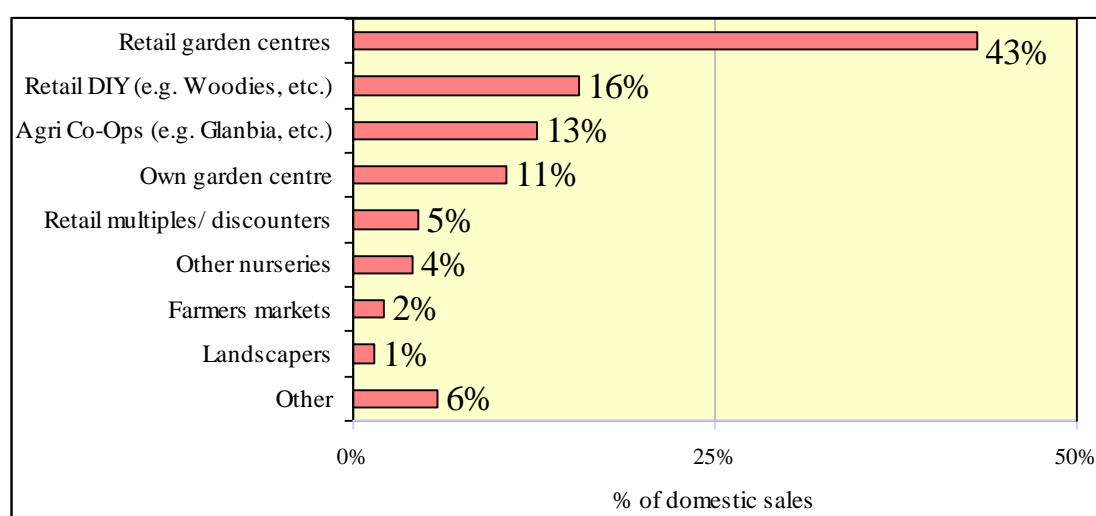
Reasons for Importing Plants/Amenity Material

(Among Bedding/Pot Plant Producers)



Among bedding/pot plant producers who imported plants or amenity materials in 2010, the most common reasons for importing are *quality* (rated the most important reason by 26% and in the top three reasons for importing by 70% of producers who imported) and *plant range* (rated the most important reason by 4% and in the top three reasons for importing by 70% of producers who imported). Price and availability were also significant factors for many of the bedding/pot plant producers that imported during 2010.

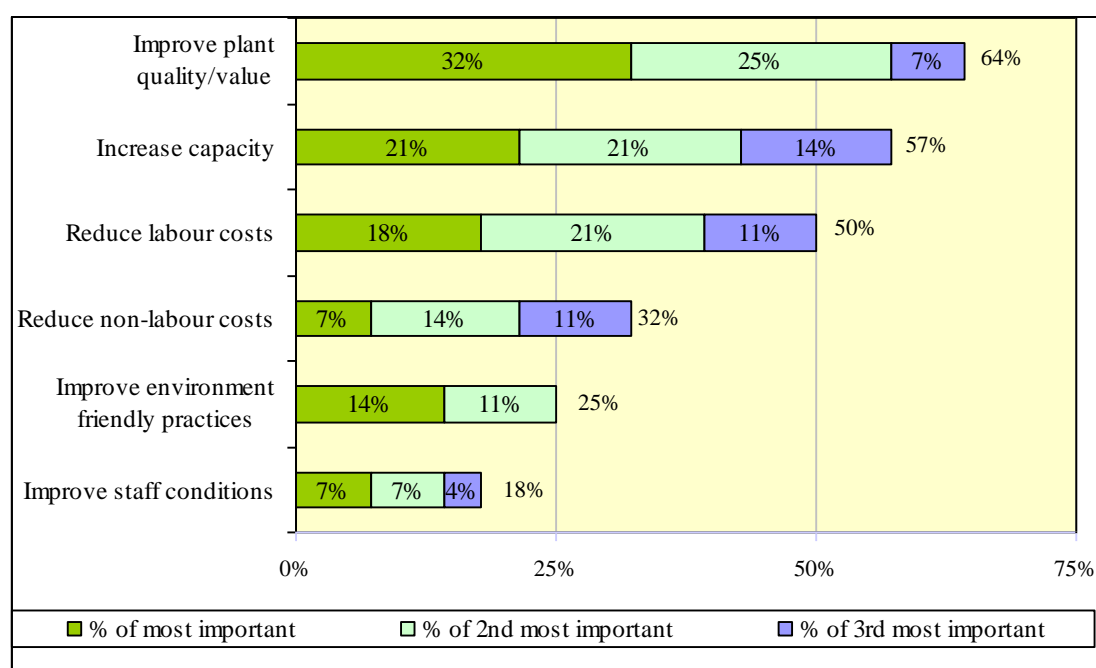
Channel Share of Bedding/Pot Plant Home Market Sales



43% of bedding/pot plant domestic sales value is to retail garden centres, 16% is to retail DIY stores, while 13% is to agricultural co-ops.

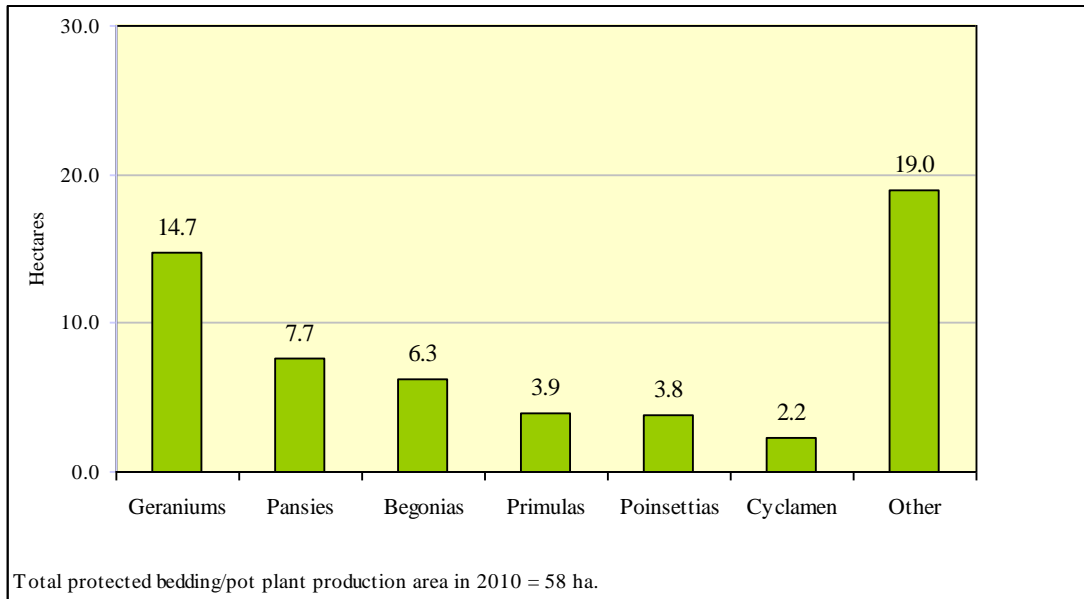
Priorities for Investment & Development

(Among Bedding/Pot Plant Producers)



Improving plant quality/value and *increasing capacity* are the main priorities for bedding/pot plant producers. *Improving plant quality/value* was rated the most important priority by 32% of producers and a top-three priority by 64%. *Increasing capacity* was rated the most important priority by 21% of producers and a top-three priority by 57%.

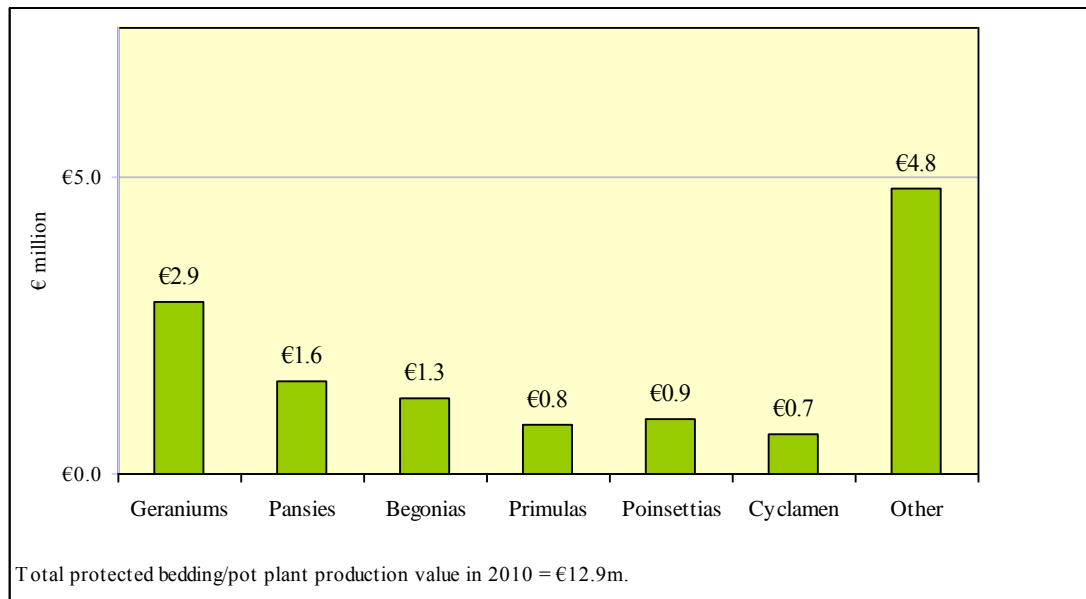
Bedding/Pot Plant Production Area 2010 (Hectares)



Geraniums are the most important bedding/pot plant in terms of area, with 14.7 hectares grown in 2010. The production area for *pansies* is 7.7 hectares, and that of *begonias* is 6.3 hectares.

Within the 'other' category are a wide range of plants such as chrysanthemums, fuschia, petunias, lobelia, impatiens and astelias.

Bedding/Pot Plant Production Value 2010 (€ million)



Geraniums are also the most important bedding/pot plant in terms of value, with a production value of €2.9 million in 2010. The production value for *pansies* is €1.6 million, and that of *begonias* is €1.3 million.

Within the 'other' category are a wide range of plants such as chrysanthemums, fuschia, petunias, lobelia, impatiens and astelias.

Section 3

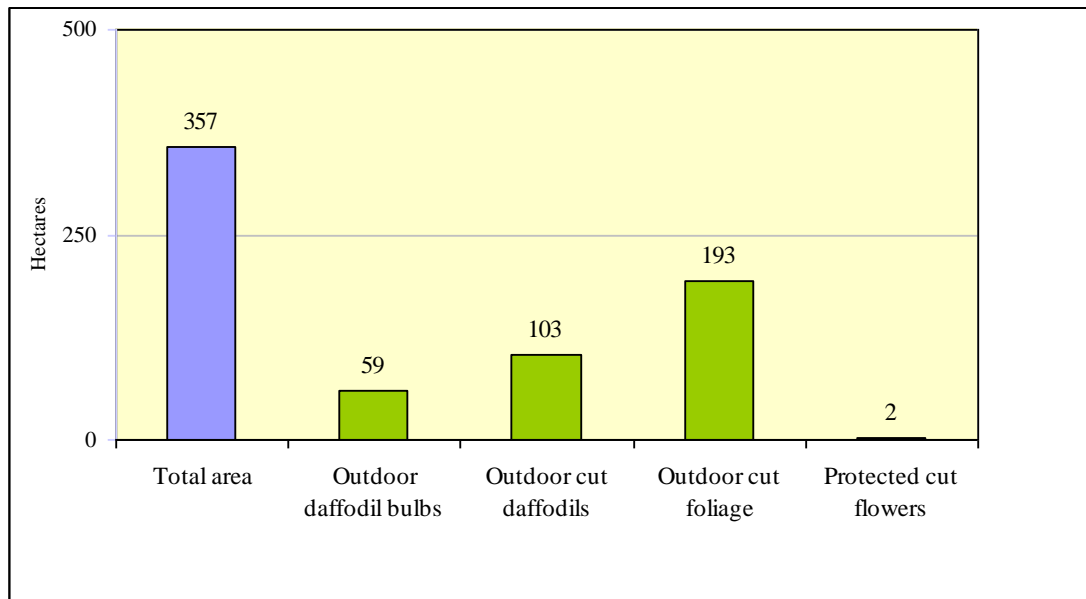
Bulbs, Cut Flowers & Cut Foliage Sector

This sector includes outdoor daffodil production (daffodil bulbs and cut daffodils), outdoor cut foliage (e.g. eucalyptus and pittosporum) and cut flowers grown under protection (e.g. alstroemeria and lilies). The production value of the sector is €3.7 million. The main counties for daffodil production are Cork and Kilkenny, the main county for cut foliage production is Wexford, and the main counties for protected cut flower production are Dublin and Clare.

Cut foliage refers to the production of ornamental/decorative plant stems for use in flower arranging and bouquet production.

The bulbs, cut flowers and cut foliage sectors were not included in previous census therefore there are no comparisons with previous years.

Bulbs, Cut Flowers & Cut Foliage Production Area 2010 (Hectares)



The total production area of bulbs, cut flowers & cut foliage is 357 hectares in 2010.

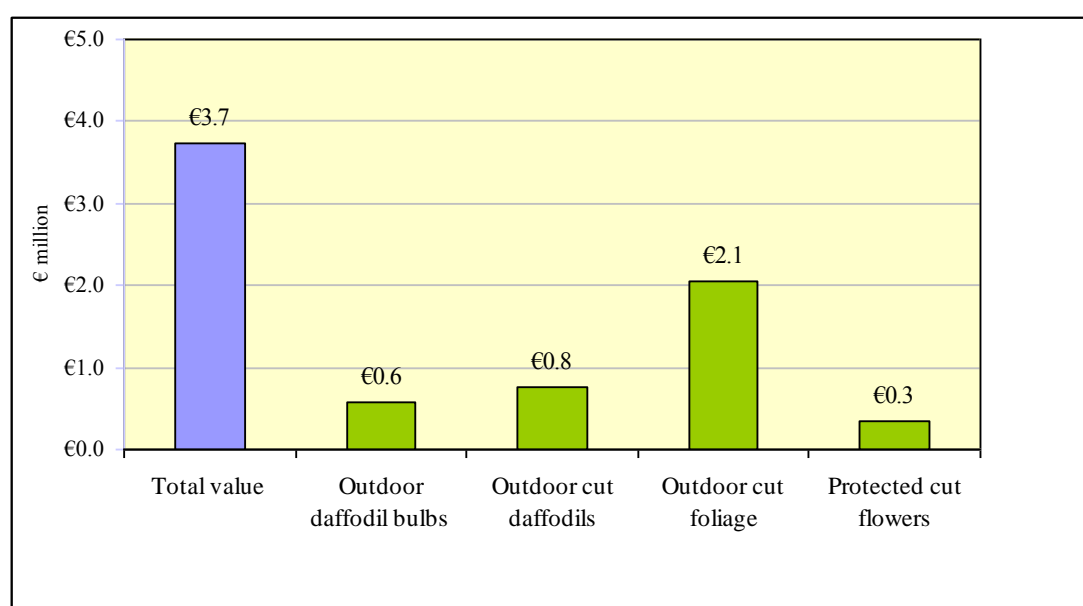
The production area of cut foliage is 193 hectares (54% of the total area).

The production area of cut daffodils is approximately twice that of daffodil bulbs.

This is partly due to daffodil production cycles whereby producers grow daffodil flowers for two or three years, with bulbs harvested on the final year of the cycle.

The main protected cut flower species are alstroemeria and lilies.

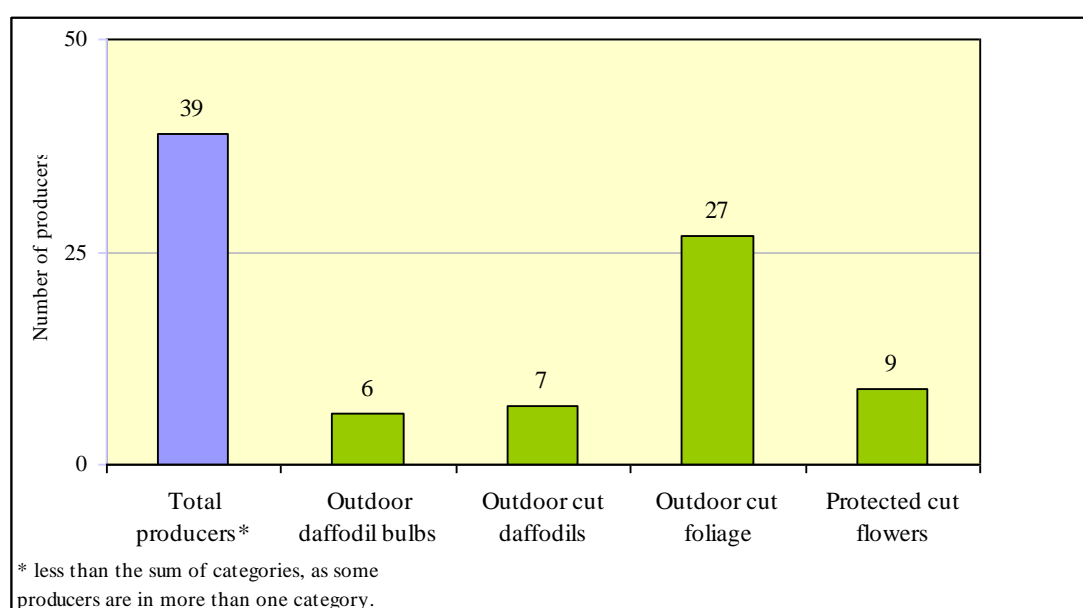
Bulbs, Cut Flowers & Cut Foliage Production Value 2010 (€ million)



The total production value of bulbs, cut flowers & cut foliage is €3.7 million in 2010. The production value of cut foliage is €2.1 million, an estimated three-quarters (75%) of which is exported (primarily to Great Britain). Daffodil bulbs and cut flowers have a combined value of €1.4 million, an estimated 60% of which is exported (the Netherlands and the USA being the primary markets).

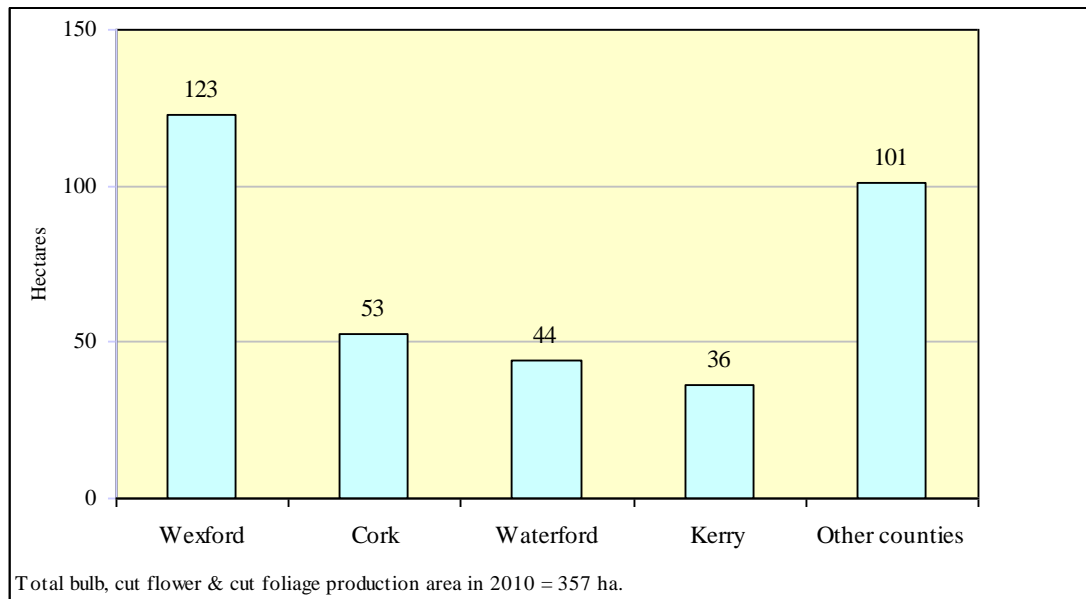
The production value for cut foliage is expected to rise significantly over the coming years as many recently established cut foliage plantations come into production. Since 2008, the cut foliage sector has undergone a significant expansion programme that has been assisted financially by the Department of Agriculture, Food and the Marine's Scheme of Investment Aid for the Development of the Commercial Horticulture Sector.

Number of Producers of Bulbs, Cut Flowers & Cut Foliage 2010



There are seven daffodil producers, 27 cut foliage producers and nine protected cut flowers producers. In total, there are 39 producers of bulbs, cut flowers/cut foliage (note: some producers are in more than one category).

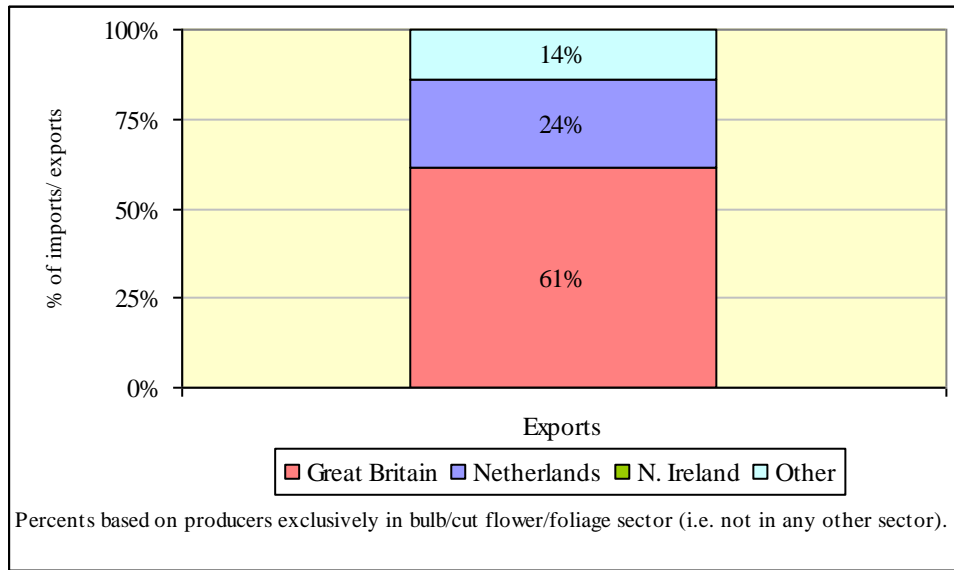
Bulbs, Cut Flowers & Cut Foliage Production Area 2010 (Hectares) by County



Wexford has a bulbs, cut flowers & cut foliage production area of 123 hectares. All of this production area is cut foliage, and it represents 64% of cut foliage production area.

Cork has a production area of 53 hectares, most of which is daffodil production. Kilkenny (included in other counties) also has a significant daffodil production area. Cork and Kilkenny together account for 66% of daffodil production area.

Bulbs, Cut Flowers & Cut Foliage Exports 2010



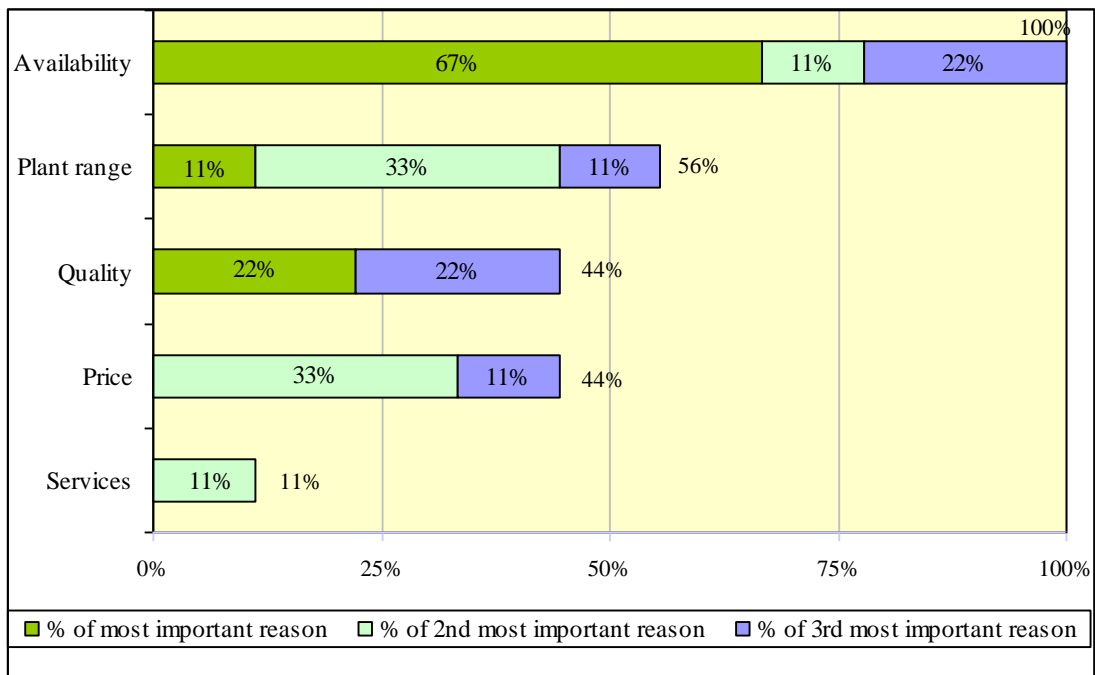
The estimated value of exports of plants/amenity material by bulbs, cut flowers & cut foliage producers in 2010 is €2.4 million*. The level of cut flowers & cut foliage imports is small (estimated value €0.2 million, primarily from the Netherlands).

Exports are primarily to Great Britain (61%), followed by the Netherlands (24%). (Among the 14% 'other' countries, the most significant is the USA).

* Census questionnaire asked producers for the total value of their imports and exports. As some producers operate in more than one amenity sub-sector, values for individual sub-sectors have to be estimated. Section 6 shows import/export value for the entire amenity sector.

Reasons for Importing Plants/Amenity Material

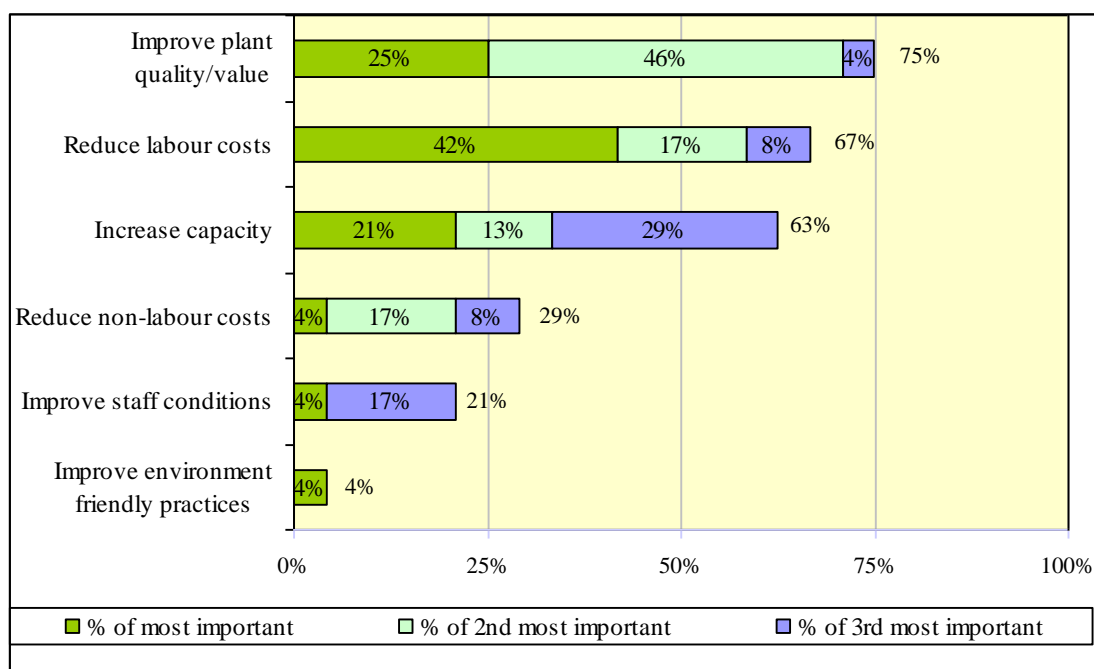
(Among Bulbs, Cut Flowers & Cut Foliage Producers)



Among bulbs, cut flowers & cut foliage producers who imported plants or amenity materials in 2010, the most common reasons for importing are *availability* (rated the most important reason by 67% and in the top three reasons for importing by 100% of producers who imported) and *plant range* (rated the most important reason by 11% and in the top three reasons for importing by 56% of producers who imported). Quality and price were also significant factors for many of the bulbs, cut flowers & cut foliage producers that imported during 2010.

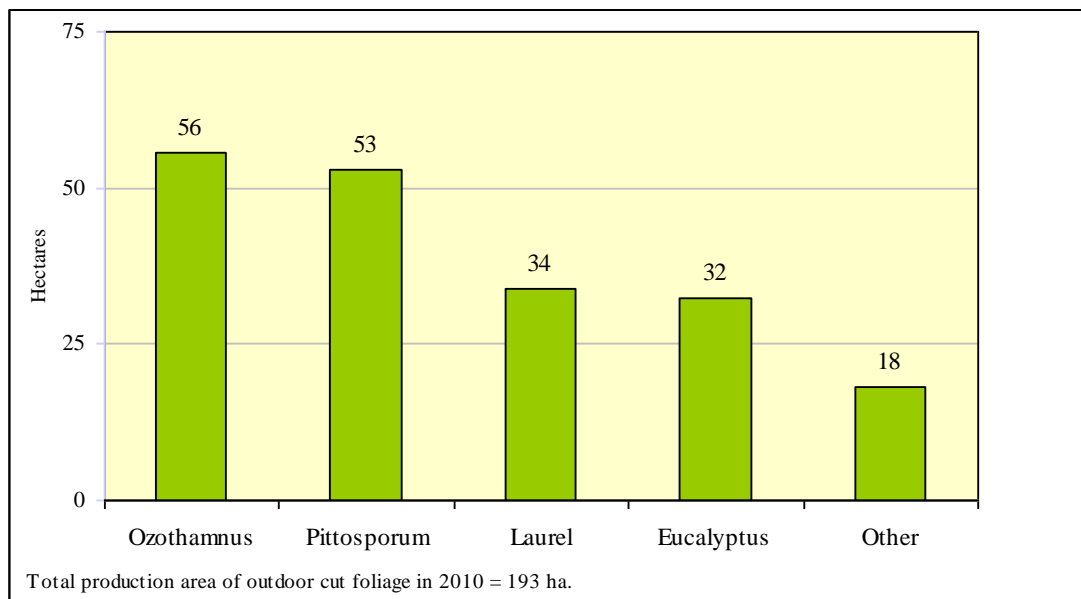
Note: a definition for *availability* was not specified in the census but it is likely to have been interpreted as covering issues such the availability of required plant species to the right specification, quantities and price.

Priorities for Investment & Development (Among Bulbs, Cut Flowers & Cut Foliage Producers)



Improving plant quality/value and *reducing labour costs* and are the main priorities for bulbs, cut flowers & cut foliage producers. *Improving plant quality/value* was rated the most important priority by 25% of producers and a top-three priority by 75%. *Reducing labour costs* was rated the most important priority by 42% of producers and a top-three priority by 67%.

Outdoor Cut Foliage Production Area 2010 (Hectares)



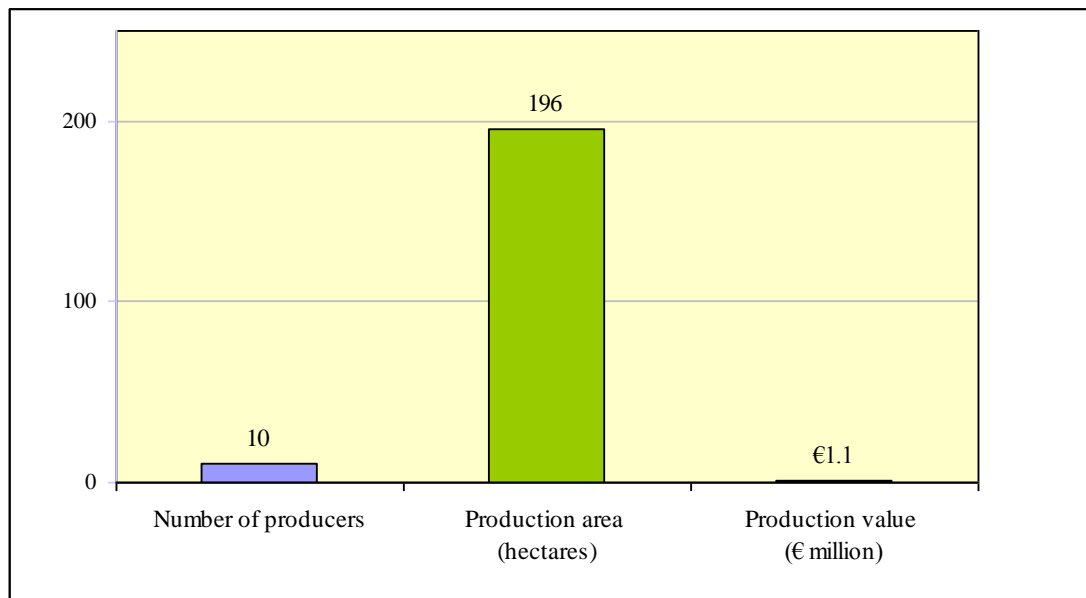
Ozothamnus and *pittosporum* are the most important outdoor cut foliage plants in terms of area, with 56 and 53 hectares of production area respectively in 2010.

Section 4

Turf Grass Sector

This section looks at turf grass production which was included in the 2010 amenity census for the first time.

Turf Grass Production 2010



There are 10 turf grass producers in 2010, with a production area of 196 hectares. The production value of turf grass is €1.1 million.

Seven of the ten turf grass producers are in Leinster (2 in Dublin, 2 in Wexford and one each in Meath, Offaly and Kildare). Together these account for 73% of turf grass production area.

The ten producers reported no imports or exports of amenity plants/materials in 2010.

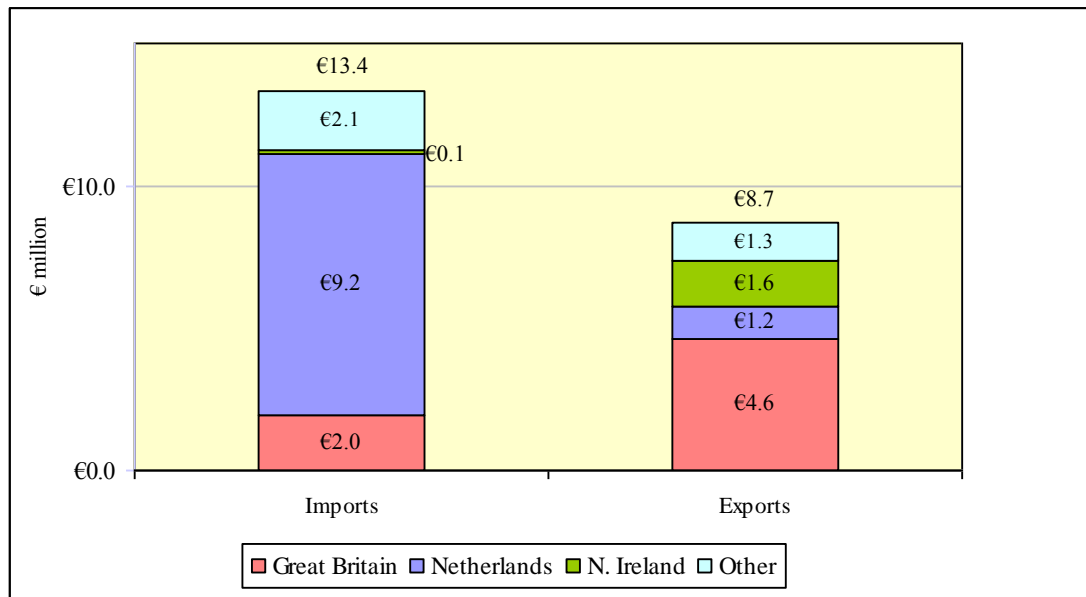
Section 5

Imports/Exports, Domestic Sales Channels, Business Development & Producer Profile

This section looks at imports/exports of amenity plants by amenity producers, channel share of home-market sales, business development priorities/issues and producer profiling information (e.g. age, identification of successor).

Note: import figures do not include imports made directly by retailers and independent garden centres.

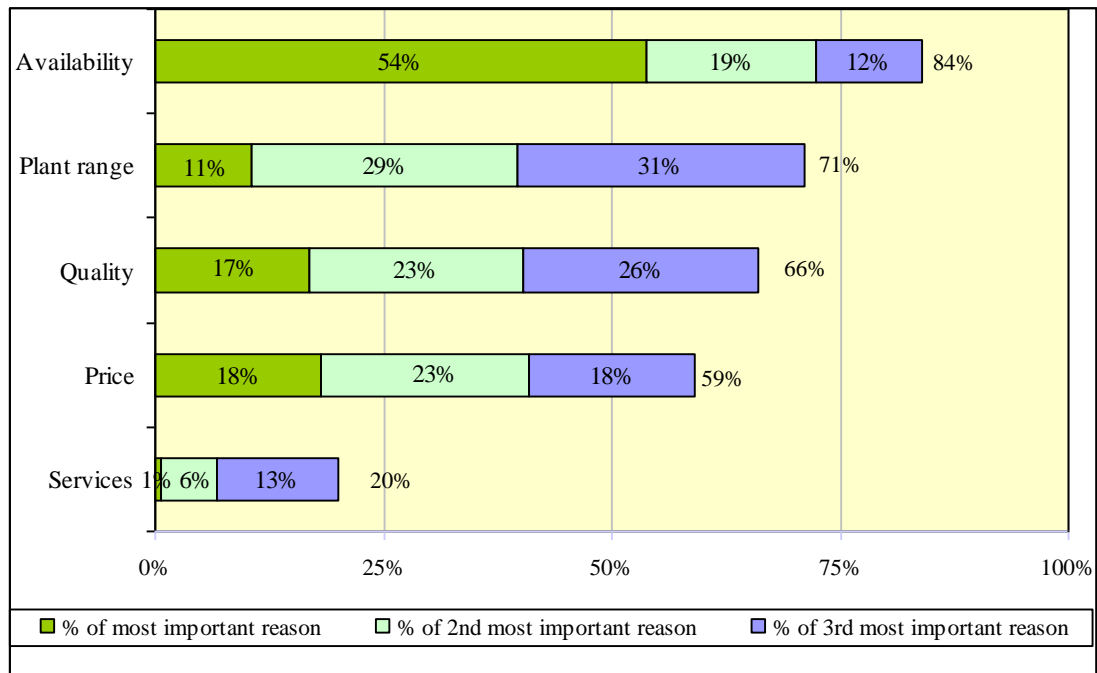
Amenity Sector Import & Export Value 2010 (€ million)



Amenity producers imported €13.4 million of plants/amenity material in 2010. The main source country for imports is the Netherlands from which €9.2 million of plants/amenity material was imported. The value of imports from Great Britain was €2.0 million. The main other countries from which amenity imports come are Italy, Belgium and France.

The value of amenity sector plants/amenity material exports was €8.7 million in 2010. The primary export market is to Great Britain to where €4.6 million of plants were exported, while cross-border exports to Northern Ireland were €1.6 million. Exports to the Netherlands were €1.2 million. Other countries to which exports are made include the USA, France and Italy.

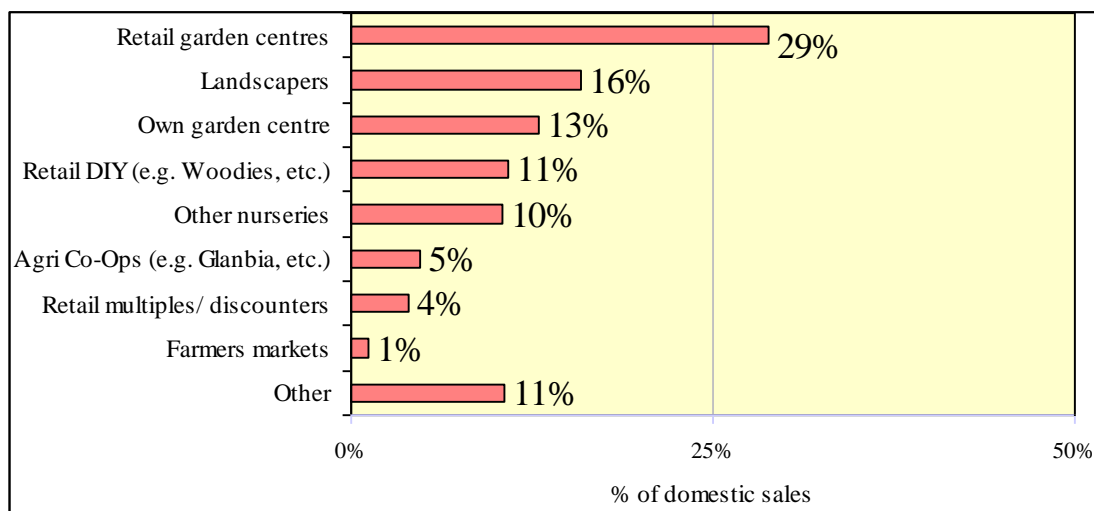
Amenity Sector's Reasons for Importing Plants/Amenity Material 2010



Among producers who imported plants or amenity materials in 2010, the most common reason for importing is *availability* (rated the most important reason by 54% and in the top three reasons for importing by 84% of producers who imported).

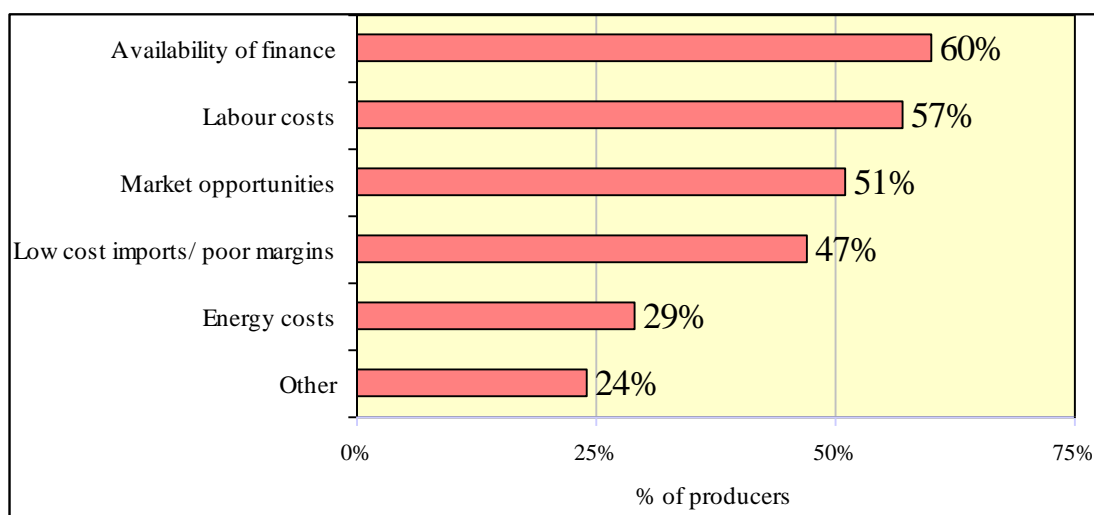
Note: a definition for *availability* was not specified in the census but it is likely to have been interpreted as covering issues such the availability of required plant species to the right specification, quantities and price.

Overall Amenity Sector Channel Share of Home Market Sales 2010



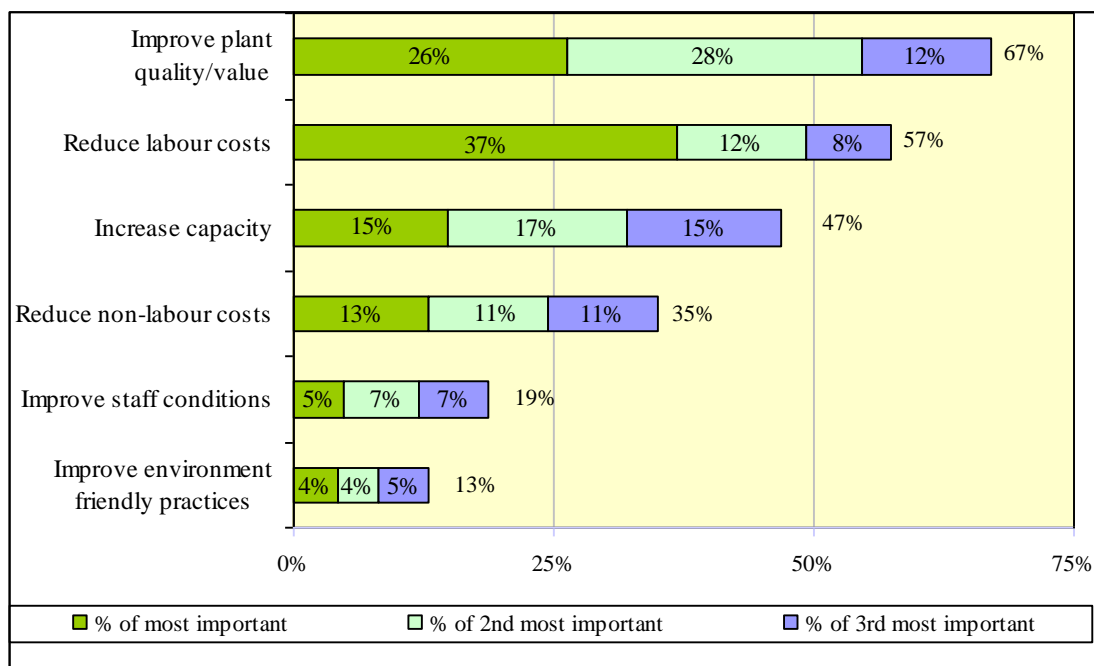
29% of sales value is to retail garden centres, 16% to landscapers, while 13% of sales value is through the producers' own garden centres.

Main Issues Affecting Competitiveness/Expansion for Amenity Sector Businesses 2010



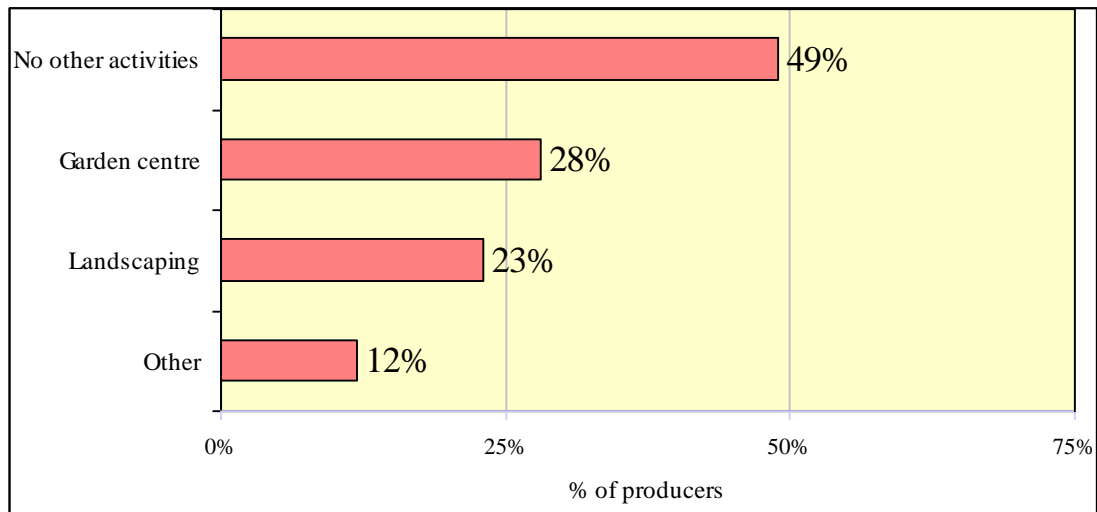
The most common business development issues which affect competitiveness/ expansion of the business in the amenity sector are *availability of finance* (mentioned by 60%), *labour costs* (57%), *market opportunities* (51%) and *low-cost imports/poor margins* (47%). Among the other issues mentioned were the weather, the economy and age issues (getting older).

Amenity Sector Priorities for Investment & Development 2010



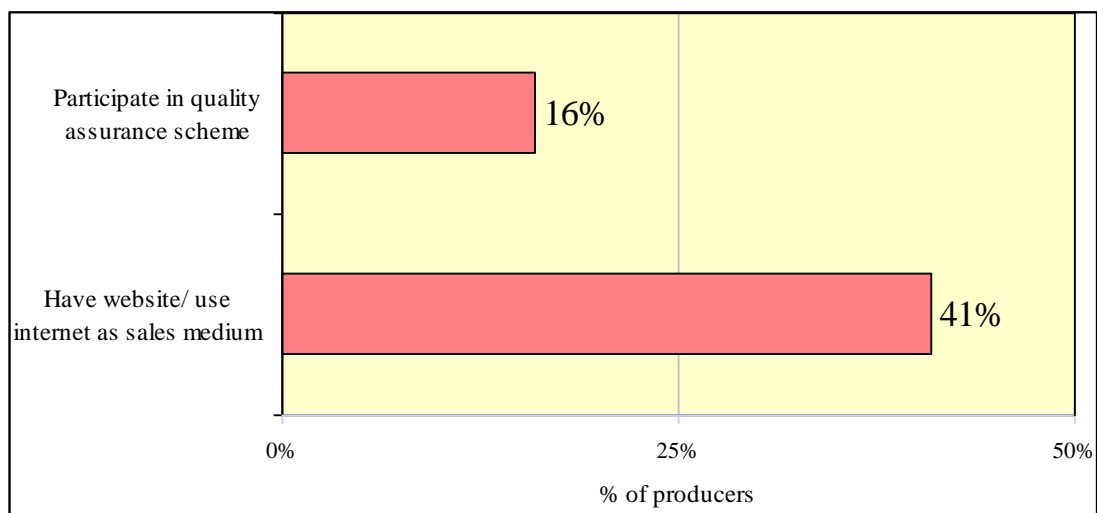
Improving plant quality/value of output and *reducing labour costs* are the main priorities for amenity producers. *Improving plant quality/value* of output was rated the most important priority by 26% of producers and a top-three priority by 67%. *Reducing labour costs* was the most important priority for 37% and a top-three priority for 57%.

Other Business Activities Pursued by Amenity Producers 2010



Almost half (49%) of producers are not involved in any other related business activity, while 28% have a garden centre and 23% are involved in landscaping. Among the 'other activities' are farming and forestry.

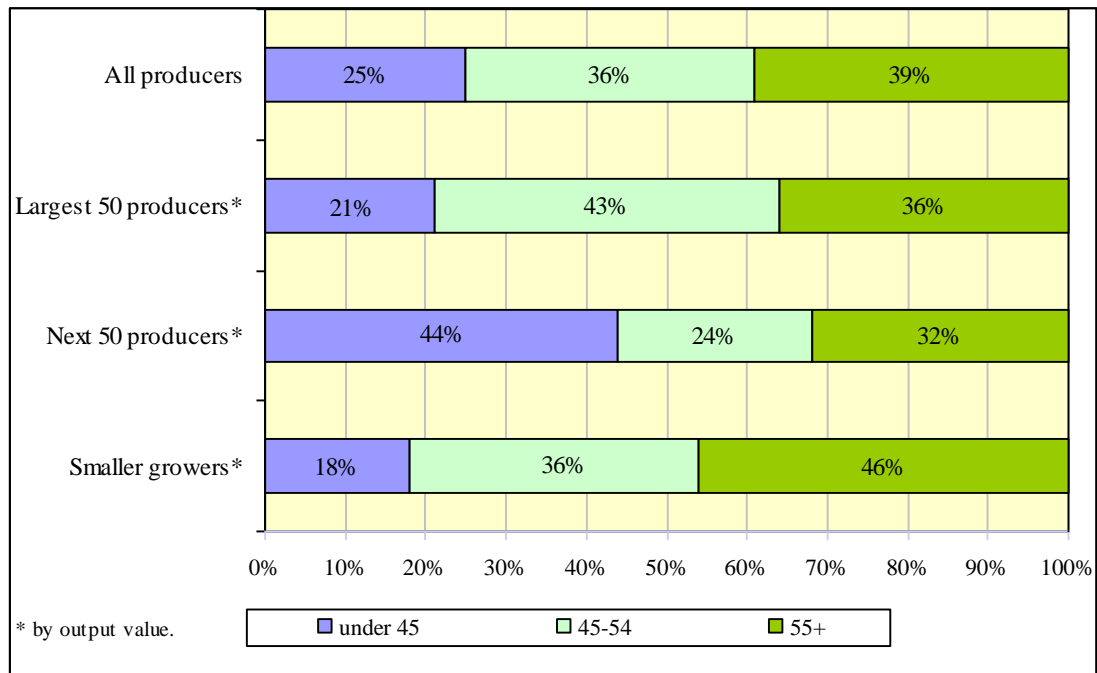
Participation in Quality Assurance Schemes & Usage of Internet for Sales 2010



Sixteen percent (16%) of producers participate in a quality assurance scheme. Most of these (14% of all producers) participate in a Bord Bia schemes, such as the Nursery Quality programme and the Quality Assurance Scheme.

Forty-one percent (41%) have a website or say they use the internet for sales purposes.

Amenity Sector Producer Age Profile 2010



The average age of amenity owners is 53 years. Smaller growers (in terms of output value) tend to have a slightly older age profile, with 46% aged 55 or over.

There was very little difference in age profile between the amenity sub-sectors. The one exception is turf grass producers, which have a slightly younger age profile (see appendix 5.3).

The census also asked if the business had an identified successor to the owner. 30% said that there is an identified successor, with 38% of owners aged 55 or over saying they have an identified successor (see appendix table 5.4).

Appendix Tables

Section One: Hardy Nursery Stock

Table 1.1: Hardy Nursery Stock Outdoor Production 2010

Ornamental plants	Open ground field production		Outdoor container production			Output value (€m)	Value per hectare ⁽¹⁾
	Growers	Hectares	Growers	Hectares	Number of plants		
Roses & rose rootstock	9	17.9	13	2.0	177,250	€0.9	€46,626
Liners/plugs	3	1.5	14	0.6	291,303	€0.2	€87,918
Shrubs (under 3 litre pots)	5	2.3	70	17.8	3,823,012	€3.3	€161,653
Shrubs (over 3 litre pots)	3	1.2	48	6.9	1,266,775	€0.8	€100,229
Herbaceous perennials	4	0.6	47	5.8	891,261	€1.8	€283,080
Other	5	4.3	15	3.8	674,305	€1.2	€144,426
Deciduous trees							
Transplants from seed	7	16.4	0	0.0	0	€0.4	€23,367
Whips & feathered trees	38	109.7	15	2.1	137,810	€2.0	€18,007
Half standards & standards	48	159.1	30	2.2	112,254	€2.1	€13,007
Extra heavy standards & semi mature	29	245.8	12	2.4	8,260	€3.4	€13,874
Fruit trees	16	13.1	27	1.7	191,935	€0.7	€48,510
Other trees & hedging							
Coniferous trees	14	8.4	13	0.2	14,850	€0.3	€33,707
Hedging	37	52.5	36	1.4	270,775	€2.0	€36,227
Total	83	632.6	98	46.9	7,859,790	€19.1	€28,037

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

Table 1.2: Hardy Nursery Stock Protected Production 2010

	Glasshouses		Polytunnels		Output value (€m)	Value per hectare ⁽¹⁾
	Growers	Hectares	Growers	Hectares		
Propagation plugs, liners, etc	27	4.3	55	10.4	€3.2	€213,942
Shrubs	18	3.4	75	23.0	€4.4	€168,331
Trees	*	*	6	0.9	€0.2	€236,203
Herbaceous perennials	13	1.5	40	4.0	€2.0	€354,495
Mother stock	*	*	4	0.2	**	n/a
Other (heathers, alpines, etc.)	5	1.3	17	2.1	€1.0	€299,166
Total	39	10.8	109	40.7	€10.8	€209,863

* value withheld to protect grower confidentiality (less than 3 growers in category).

** mother stock does not have a defined value (cuttings for growing new plants)

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

Table 1.3: Hardy Nursery Stock Production (outdoor and protected) 2010 by County

	Growers	Hectares
Tipperary	10	316.9
Kildare	25	105.6
Cork	17	105.1
Wicklow	6	32.8
Dublin	7	25.3
Wexford	12	19.8
Waterford	9	18.0
Offaly	4	15.6
Kilkenny	13	14.7
Galway	9	11.7
Meath	10	10.2
Westmeath	9	9.4
Limerick	9	7.2
Kerry	8	5.4
Donegal	5	4.9
Other counties*	18	28.4
Total	171	731.0

* counties 3 or fewer producers were combined in 'Other counties' to protect confidentiality.

Section Two: Bedding/Pot Plants

Table 2.1: Bedding/Pot Plant Production 2010

Bedding/pot plants	Glasshouses			Polytunnels			Output value (€m)	Value per hectare ⁽¹⁾
	Growers	Hectares	Number of plants	Growers	Hectares	Number of plants		
Begonias	39	5.1	5,293,212	45	1.1	743,300	€1.3	€200,312
Chrysanthemums	5	0.8	372,672	8	0.04	22,396	€0.2	€243,324
Poinsettias	7	3.7	295,000	3	0.1	13,666	€0.9	€242,429
Cyclamen	15	2.0	869,133	14	0.2	99,963	€0.7	€303,031
Pansies	27	3.4	3,264,915	40	4.3	5,181,520	€1.6	€203,948
Primulas	27	3.0	1,975,615	29	0.9	637,526	€0.8	€212,130
Geraniums	12	12.0	15,388,366	11	2.7	3,552,766	€2.9	€196,129
Patio plants	5	1.4	362,900	9	0.3	153,800	€0.4	€227,055
Other	35	10.3	5,762,465	57	6.1	7,502,027	€4.2	€257,233
Total	46	41.8	33,584,278	68	15.8	17,906,964	€12.9	€224,892

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

Table 2.2: Bedding/Pot Plant Production 2010 by County

	Growers	Hectares
Cork	9	22.5
Wexford	9	8.8
Dublin	5	8.8
Meath	11	7.9
Louth	8	1.7
Wicklow	4	1.1
Galway	5	1.1
Limerick	7	0.7
Kildare	7	0.7
Kilkenny	5	0.6
Kerry	5	0.5
Other counties*	19	3.3
Total	94	57.6

* counties 3 or fewer producers were combined in 'Other counties' to protect confidentiality.

Section Three: Bulbs, Cut Flowers & Cut Foliage

Table 3.1: Outdoor Daffodils & Outdoor Cut Foliage Production 2010

Bulb production*	Field production		Output value (€m)	Value per hectare ⁽¹⁾
	Growers	Hectares		
Daffodils	6	58.8	€0.6	€9,612
Cut flowers**				
Daffodils	7	103.5	€0.8	€7,446
Cut foliage				
Eucalyptus	16	32.3	***	n/a
Pittosporum	19	52.9	***	n/a
Ozothamnus	12	55.7	***	n/a
Laurel	8	33.8	***	n/a
Viola	6	5.2	***	n/a
Other	7	13.2	***	n/a
Total cut foliage	27	193.1	€2.1	€10,875
Total	32	355.4	€3.4	€9,668

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

* two producers of outdoor tulip bulbs have been omitted due to the small production area involved.

** two producers of outdoor lily cut flowers have been omitted due to the small production area involved.

*** value for individual plants not asked in census

Table 3.2: Protected Cut Flower Production 2010

	Glasshouses			Polytunnels			Output value (€m)	Value per hectare ⁽¹⁾
	Growers	Hectares	Number of plants	Growers	Hectares	Number of plants		
Cut flowers	8	1.6	813,342	3	0.3	155,500	€0.3	€180,232

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

Note: one producer with a small area of bulbs under protection has been omitted due to the small production area involved.

Table 3.3: Bulbs, Cut Flowers & Cut Foliage Production (outdoor & protected) 2010 by County

	Growers	Hectares
Wexford	11	123.0
Cork	4	52.5
Waterford	4	44.4
Kerry	5	36.4
Dublin	4	12.6
Other counties*	11	88.3
Total	39	357.2

* counties 3 or fewer producers were combined in 'Other counties' to protect confidentiality.

Section Four: Turf Grass

Table 4.1: Turf Grass Production 2010

	Field production		Output value (€m)	Value Per Hectare ⁽¹⁾
	Growers	Hectares		
Turf grass	10	195.7	€1.1	€5,665

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

Section Five: Amenity Sector Production Facilities

Table 5.1: Protected Facilities Area 2010

	Growers	Hectares
Glasshouses	76	31.1
Polytunnels	154	53.8
Total	175	85

Table 5.2: Percent of Amenity Producers with Various Equipment/Facilities 2010

	Hardy nursery stock producers	Bedding plant producers	Cut flowers & cut foliage producers	Daffodil producers	Turf grass producers
Cold Storage	13%	15%	9%	71%	*
Cold Storage average area (m ³)	391 m ³	309 m ³	614 m ³	927 m ³	*
Bulk Bag Compost Breaker	12%	16%	*	*	*
Potting Machines	37%	36%	*	*	*
Tray Filler	15%	31%	*	*	*
Auto Transplanter	8%	18%	*	*	*
Auto Plant Lifting System	8%	*	*	*	*
Conveyor System	20%	*	*	*	*
Conveyor System average length (metres)	112 m	*	*	*	*
Caning Machine	9%	*	*	*	*
Tree Lifters	21%	*	*	*	*
Pruning Platforms	9%	*	*	*	*
Computerised Traceability System	11%	*	*	*	*
Computerised Traceability System: % of output covered	90%	*	*	*	*
Automated label applicator	6%	*	*	*	*
Automated label applicator: % of output covered	72%	*	*	*	*
Bulb Harvester	*	*	*	57%	*
Bulb Washer	*	*	*	14%	*
Bulb Grader	*	*	*	57%	*
Turf Grass Harvester	*	*	*	*	100%

* equipment/facility type not applicable to the sector

Table 5.3: Owner Age

	All producers	Hardy nursery stock producers	Bedding plant producers	Cut flowers & cut foliage producers	Turf grass producers
Under 35	5%	4%	3%	5%	10%
35-44	21%	20%	17%	14%	50%
45-54	36%	34%	42%	41%	20%
55-64	24%	26%	25%	22%	10%
65+	15%	16%	13%	19%	10%

Table 5.4: Does Owner Have an Identified Successor?

	% Yes				
	All producers	Hardy nursery stock producers	Bedding plant producers	Cut flowers & cut foliage producers	Turf grass producers
All producers	30%	32%	23%	31%	60%
Owners under 45 years old	22%	20%	21%	29%	33%
Owners aged 45-54	28%	21%	26%	53%	100%
Owners aged 55+	38%	47%	23%	13%	100%

End.