

Sectoral Road Map: Horticulture

Market and policy issues

The horticultural sector contributes close on €290 million (CSO, 2008) to agricultural output at farm-gate level and provides over 6,000 jobs in the production sector and a further 9,000 in the amenity services sector. There is considerable potential for the development of horticulture at both production and value-added levels. Fruit and vegetables play a very important role in addressing the nation's health problems and horticultural pursuits contribute to a positive lifestyle.

The horticultural sector will exploit the development potential of the mushrooms, fruit/vegetable and nursery stock/cut foliage sectors as follows:

- support innovation that adds value in the food sector, taking advantage of the positive healthy profile associated with fruit and vegetables;
- support innovation that creates diversity in the nursery stock/cut foliage sector; and,
- use producer organisations to drive investment and consolidate market developments where possible.

The Teagasc horticultural programme will focus on:

- profit from productivity;
- innovation for added value;
- energy efficiency;
- producer organisations; and,
- regulatory compliance issues.

Shape and size of sector in 2018

- Overall increase in farm-gate output (from 2008) of approximately 15% to €333 million.
- Continuation of consolidation, specialisation and capitalisation of enterprises.
- Anticipated 600-700 sustainable commercial production units.

Technical performance

- Mushrooms: target of 380kg/tonne using phase three compost, increased use of system-built units and possible



development of robotic picking. Develop and promote energy-efficient systems. Develop and promote disease control strategies with reduced pesticide inputs.

- Nursery stock: improved efficiency in controlling wastage and increasing crop turnover. New plants and added-value products are required.
- Vegetables: crop management and protocols will need to change, with reduced pesticides and new regulations. Innovation in crops and vegetable products is required.
- Fruit: adoption of protocols to improve quality in supply of a range of crops over maximum season. Post-harvest techniques to extend shelf life and even out supply. Increase strawberry tray plant propagation to supply 80% of the Irish market and increase exports to the UK.
- Full implementation of integrated pest management (IPM) across the sector.
- Benchmarking of enterprises to improve labour efficiency.
- Continued season extension and management protocols for new crops.
- Capitalise on the healthy image of horticultural produce and lifestyle pursuits.



Environmental and land use implications

- The sector will continue to be largely located east of a line from Monaghan to Limerick.
- Spent mushroom compost utilisation is the only significant waste problem.
- Water restrictions may be a future issue.
- IPM adoption and restricted pesticide availability will reduce environmental loading.

Research and advisory actions

- Continue to revitalise Teagasc’s capacity in horticultural research, particularly in the main and emerging enterprises and the basic services of pathology, entomology and post-harvest technologies.

- Update Teagasc’s research and training facilities to commercial standards.
 - Collaborate with food and biotech research personnel to innovate and add value to horticultural produce.
- Strengthen the provision of a fully integrated research, advisory and education programme.

Comment

The need for ongoing industry modernisation remains a key priority to attain the efficiencies required in a competitive global horticultural industry. New EU regulations concerning pesticides were enacted in November 2009. These, together with the volumes of existing regulations including the Nitrates Directive, hygiene regulations, etc., will have major implications for all growers, as well as the input and output service industries. The goal of Teagasc will be to provide the industry and growers with the knowledge and skills to implement these regulations, while enabling growers and the industry to deliver increased profit from productivity.

Contact

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The road map for horticulture is available on www.teagasc.ie.

Technical efficiency improvements

Factor	Sector average		Top 10% of producers 2018
	Current	Target 2018	
Yield improvement mushrooms kg/t compost phase 3	318	380	390
Increased use of renewable energy by growers of mushrooms and protected cropping	<5%	>40%	>80%
Irish strawberry tray propagation to account for increased production – % of crop	40	80	90
Integrated pest management technology will be implemented by increased % of growers	<5%	100%	
Increase in produce marketed through producer organisations (%)			
Mushrooms	90	95	
Soft fruit	10	70	
Top fruit	0	30	
Vegetables	0	60	