

Horticulture Road Map 2030

Horticulture sector profile

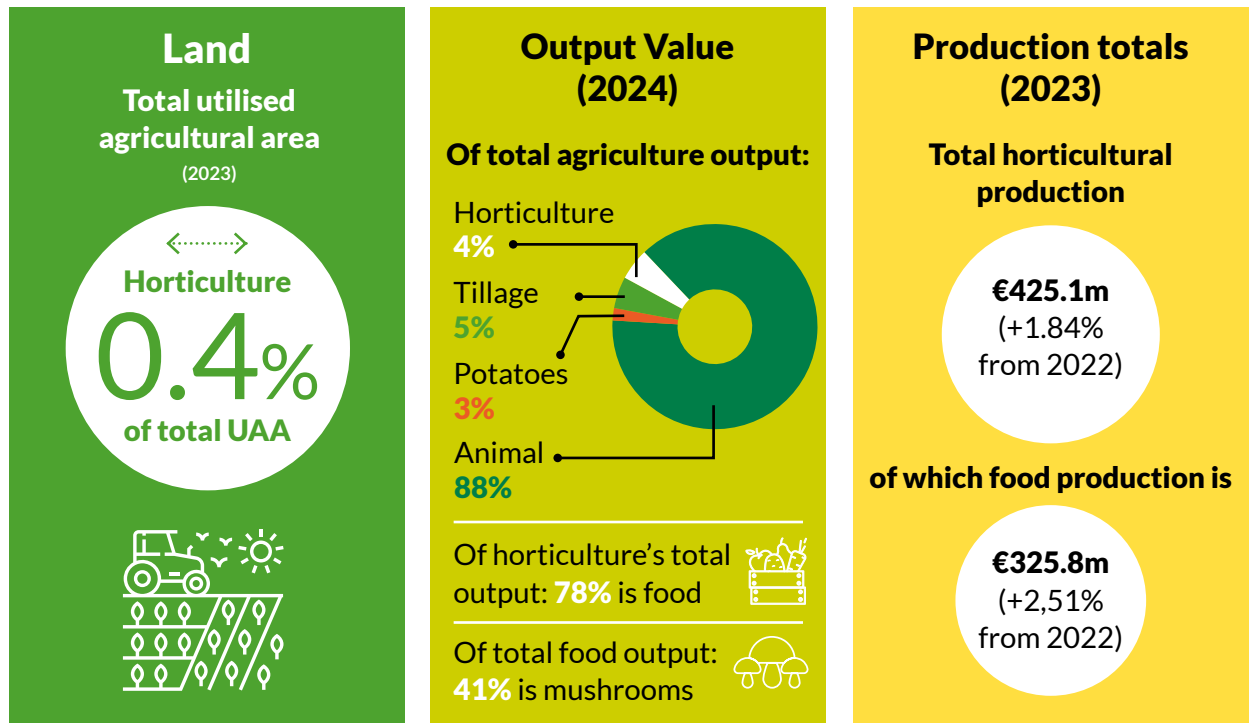
The horticulture sector is a specialised sector of Irish Agriculture that contributed €644m (including €220m potatoes) to agricultural output in 2025 from less than 0.4% of land UAA. The National Strategy for Horticulture (2023-2027) estimates that the sector provides 7,000 jobs in primary production, and a further 11,000 in amenity and downstream services.

Demand for fresh produce and plants is strengthening due to an overall increase in population and increased interest in whole foods and plant based nutrition, as well as increased volatility of fresh produce supply from the European market.

The majority of Irish produced horticulture products are sold on the Irish market apart from mushrooms (>85% exported, mainly to the UK). Bord Bia values horticulture exports as > €240m for 2024 and 2025. Ireland also imports >€1bn of horticultural food products – some of which cannot easily be grown in Ireland (for example citrus fruits, nuts etc). Ireland also imported €150m of amenity crops (flowers etc) in 2023.

Irish growers face the challenge of supplying the marketplace daily with quality assured, low environmental impact products at competitive prices without subsidies and supports, in competition with imported produce from lower costs economies. This has led to a recent trend of consolidation across the sector with larger scale growers producing the vast majority of output.

Horticulture sector statistics



Food production			
Mushrooms (€ millions)	Field crops (€ millions)	Edible protected crops* (€ millions)	Apples (€ millions)
2022 129.9	2022 89.4	2022 88.1	2022 9.4
2023 136.3	2023 95.9	2023 84.0	2023 9.0

*approx half vegetable/half fruit

Sub Sector commentary



Mushrooms

The sector has consolidated significantly in recent years and currently faces two key challenges, (1) a transition away from peat casing and (2) integration of automated picking systems into the production system. These technology adoptions are significant and will require significant capital to realise. Both will likely challenge overall yields but should reduce the reliance on labour, stabilise the production base and improve the sustainability of the sector.



Soft fruit

The soft fruit sector is primarily made up of strawberries. Expansion will focus on season extension through the increased adoption of glasshouse and lighting technology. Automated harvesting technology is likely to begin to be commercially available which will assist with labour shortages. The sector will continue to focus on identifying varieties with high sensory attributes and large fruit size to aid faster picking.



Organic Vegetable production

The national strategy to increase the area of organic production can provide rotational opportunities for tilled land, particularly in production areas of the east and south with access to water. The market for organic produce, both in the retail and direct sales market is growing and there is the potential to grow supply through developing better working relationships across sectors.



Vegetables

The vegetable sector is largely an outdoor field based sector and the majority of output comes from a small number of specialised growers of individual crops such as carrots and broccoli etc. There are opportunities to provide fresh produce at the 'shoulders of the season' but this will require substantial investment and would also be aided by improved management techniques. Land identification and production systems will also need to evolve to deal with extreme weather events by identifying sites with good drainage as well as access to water and investing in planting and irrigation equipment. Increased adoption of IPM approaches will also be required as the availability of effective Plant Protection Products narrows. Investment in labour savings technologies may help reduce costs.



Apples

The eating apple sector has significant potential to expand but must evolve in some key areas to remain competitive. These include identification of most suitable varieties and rootstocks across Ireland, optimising crop load management strategies and adopting precision orchard management strategies. Life cycle assessment of commercial training systems is also essential to guide sustainable production. Additionally, robotic harvesting, artificial intelligence, and advanced data collection tools to support decision-making and improve orchard management efficiency, adapted to Irish conditions are required.

Sub Sector commentary continued...



Nursery stock/ornamentals

Identifying varieties that can produce high quality plants in low input, low energy protected environments, including peat-free media while being appealing to the market will be a key focus of the sector as will be developing new market opportunities capitalising on Irelands climatic and geographical advantages.



Cut foliage

The cut foliage sector has significant potential to expand to meet market demand - particularly in the “cut flower” area including specific lines such as Peony and Scented Stock.

Horticulture sector challenges and responses supported by Teagasc

Economic



Market outlook

Overall demand is strong for Irish horticulture products although markets are regularly challenged by downward price pressure from imported produce. Teagasc supports profitable, low carbon, climate adapted systems which are resilient in the face of market fluctuations. Key features for the future include availing of premium markets; valorising crop residues and waste products; development of producer organisations and implementation of labour saving practices and technology.



Food and Non-Food products

Market demand continues to grow for plant based products, extracts and novel amenity products which has yet to be exploited fully. Teagasc will support new products and novel processing to support the generation of plant-based ingredients for the food and non food industry as well as increased diversity in the nursery stock/cut foliage sector.



Market data

Enhanced data on the market size and opportunity within individual categories as well as better information on crop inputs is required to support national strategy and grower investment decisions. Teagasc supports the collation of data to better inform the development of the sector as well as the collection of sectoral input data to assist in the development of Irish specific sustainability metrics.

Horticulture sector challenges and responses supported by Teagasc continued...

Social



Balanced rural development

Horticulture can provide a diversification opportunity for existing producers, as well as new entrants as new and more diverse range of crops are grown for food and non-food use. Teagasc programmes focus on providing sustainable production systems for current and emerging horticultural crops.



Technology

Commercial growers will use increased automation and precision technologies to reduce the reliance on labour and maximise crop inputs. Teagasc supports digitalisation, technology adoption and automation of the industry – particularly in the areas of crop harvesting, precision equipment and crop data for management.



People

While automation continues to be developed and adopted, the sector still requires a supply of skilled labour. Teagasc facilitate upskilling of horticulture producers and operators in specific enterprises through advisory and education.



Health and Safety

As a sector dependant on full time and part time labour there is a strong focus on operator health and safety. Teagasc supports improved health and safety in horticulture through advice, education and support for adoption of automation systems that improve working conditions.



Food Safety and Food Quality

Horticulture needs to maintain its high standards and around food quality and safety particularly for ready to eat crops. Teagasc programmes in horticulture support the maintenance of current standards, deal with emerging challenges to food quality and safety and assist with developing approaches to reduce on-farm risks.



Enterprise integration

Increased integration of horticulture and tillage farming can bring benefits to both. Teagasc is promoting integration – particularly with tillage farmers to support crop rotation, nutrient efficiency and Integrated Pest Management (IPM) where appropriate.

Horticulture sector challenges and responses supported by Teagasc continued...

Environment



Water quality

Minimising nutrient losses to waterways is crucial to improving water quality. Teagasc supports action to improve water quality through the Better Farming for Water: 8 - Actions for Change campaign and other collaborative initiatives.



Carbon efficient farming

Horticulture enterprises are typically considered to be carbon efficient however more Irish specific data is required to assess and monitor progress. Teagasc is supporting climate action in horticulture, in particular, through diversification crops (eg apples) and development work on defining sustainability metrics for the sector.



Biodiversity

The Irish horticulture sector will need to implement measures to improve the spaces for nature on farm and in units, both in terms of quantity and quality. Teagasc will support improved biodiversity for horticulture under various initiatives including existing sustainability schemes.



Soils + Growing Media

Maintaining soils in good health with good physical, chemical and biological characteristics is essential for growers as is the efficient use of growing media. Teagasc programmes support careful nutrient management planning and the identification of new, renewable and circular sources of growing media.



Integrated Pest Management

Regulation and public opinion are increasing pressure on the safe use of pesticides. Teagasc will support producers in sustainable production techniques by making best use of integrated pest management (IPM) in crop production.

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