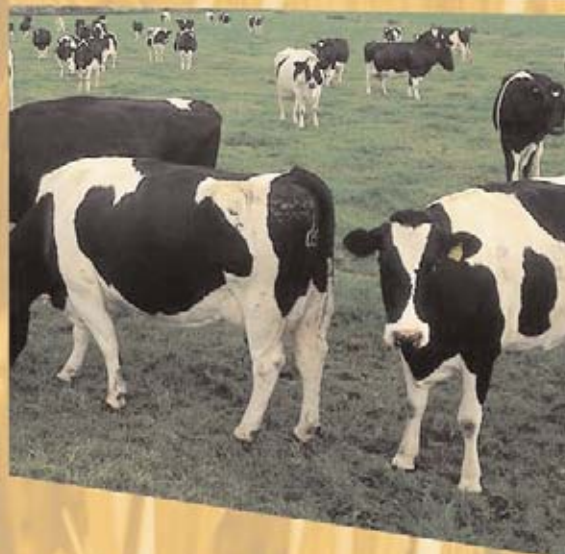
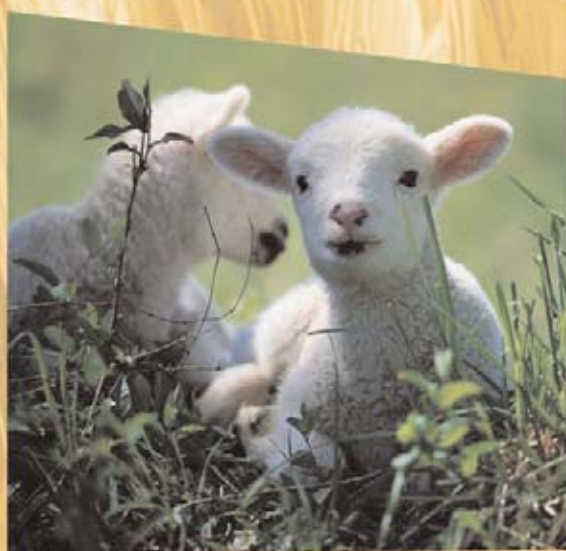


Census of Irish Organic Production 2002



THE DEPARTMENT OF
AGRICULTURE & FOOD
AN ROINN TALMHAÍOCHTA AGUS BIA

Background & Introduction

In November 2000, an Organic Development Committee was established on foot of a recommendation in the Agri-Food 2010 Report. The Committee was drawn from a wide range of stakeholders which included the organic farming bodies, retail and processing interests, the main farming organisations, the Consumers Association and a number of state agencies. The terms of reference of the Committee were as follows:

"to recommend a coherent development strategy to achieve expansion in production, processing and marketing of Irish organic produce and to secure an increased share of the growing national and export markets; and to consider the broad actions necessary for the most advantageous long-term future development of the Irish organic sector while protecting its integrity."

The Committee presented its report in April 2002 which contained a range of recommendations for action by the various stakeholders in the organic sector. Among these was a priority recommendation that a census of organic producers be carried out in order to establish baseline data on the sector and provide a benchmark against which future development could be measured.

In late 2002, a National Steering Group for the Organic Sector was established to assist in the future development of the sector and provide a basis for advancing the partnership between the principal interests in the sector. At its first meeting, the Steering Group agreed to carry out the census of organic farming.

In February 2003 the Department of Agriculture and Food posted questionnaires to those organic producers registered with the Department of Agriculture and Food. The census questionnaire involved the producer answering 18 questions on a range of issues such as their organic status and area farmed, their livestock and crop production in 2002 and the markets they found, production facilities, internet usage, employment numbers and whether they were a member of a producer group and the key issues facing them.

The census questionnaire was completed by 592 producers. The Department of Agriculture and Food and the three organic bodies provided information on livestock numbers and land area for a further 261 producers, giving a total of 853 producers. Figures in Section 1 of this report (number of producers, employment and total area) are adjusted upwards to represent all 923 producers registered with the the Department of Agriculture and Food as at the 31st December 2002. Figures in the remaining sections are based on the 853 producers for whom data was available.

The Department of Agriculture and Food and the National Steering Group would like to thank all producers who participated in this census.

The data analysis and the preparation of the report was conducted by Franklin Research Ltd (Dublin).

Summary of Findings

Summary of Findings

There are 923 registered organic producers in Ireland as at the end of 2002. Of these, 747 have attained full organic status while 176 have begun the process of conversion to organic status. The sector is very much concentrated in the south and west of the country, with Munster and Connacht accounting for three-quarters of all organic producers. The organic sector provides 777 full-time jobs and 993 part-time jobs, plus approximately 1,800 seasonal jobs.

The total land area involved in organic production is 29,850 hectares. 23,432 hectares of this is fully organic land while 6,418 hectares is land that is under conversion. Data from the Central Statistics Office indicates that there are 4.4 million hectares of land in Ireland devoted to agriculture, meaning that 0.7% of agricultural land is in organic production.

There are 577 organic bovine producers and a total of just under 18,000 bovine animals. There are over 6,000 organic suckler cows in Ireland in 2002. In general beef producers are able to sell their animals to organic markets, rather than selling them conventionally. Only 16% of organic bovines sold in 2002 were sold as conventional livestock. The census does not provide any statistics on prices received for organic bovines but many producers expressed concern about prices and profitability (see below). There are only 23 organic dairy producers with a combined total of 649 dairy cows.

There are 286 organic sheep producers with a total of over 31,000 sheep. Most (72%) finished lambs are sold to organic markets, but most (69%) store lambs are sold conventionally.

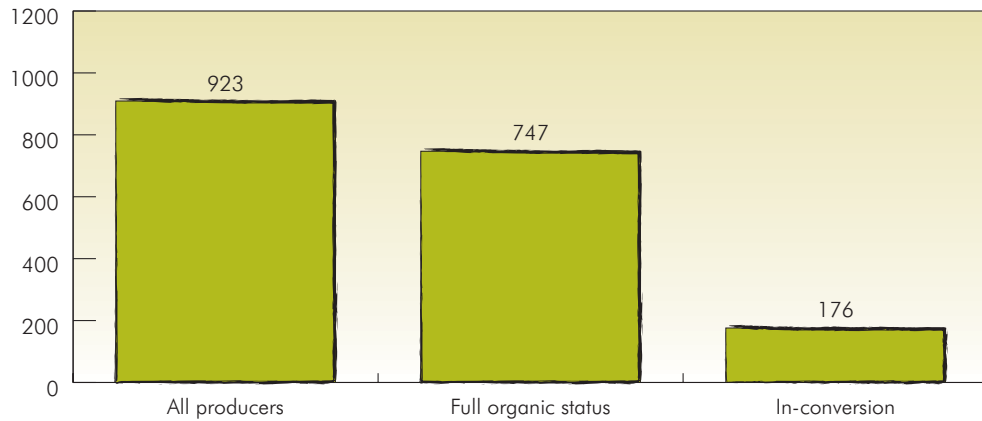
There are 64 producers in organic egg production, 34 producers with organic goats and 25 producers with organic pigs.

As expected there are fewer producers in organic crop production than there are with organic livestock. There are 77 producers growing organic vegetables, 40 growing organic cereals, 30 growing organic potatoes and 22 growing organic fruit.

The questionnaire also asked organic producers about the key barriers to future expansion of their organic business. The related issues of lack of markets and lack of profitability were rated as big barriers by over half of producers. Other issues include poor weather (rated by 44% as a big barrier to future expansion), over regulation (38%) and lack of information and advice (33%). While the issues highlighted are negative it is worth recording that the question posed sought negative comment and positive issues were not similarly sought in the questionnaire.

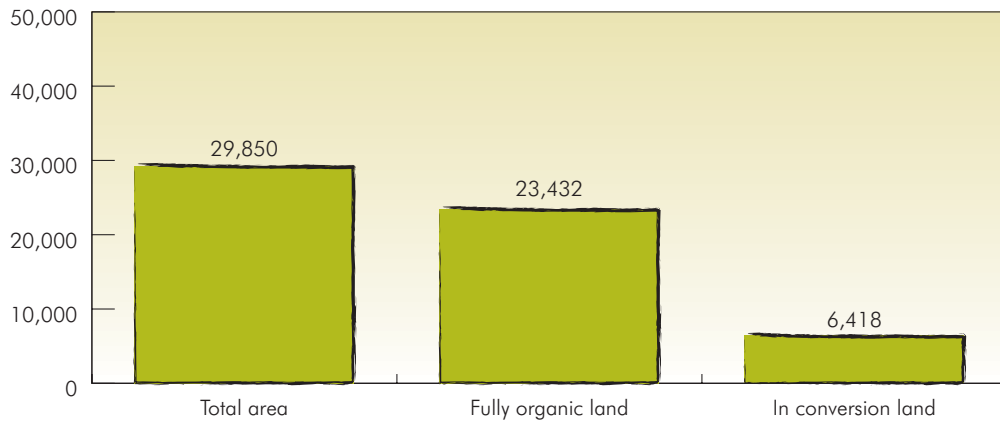
Section I: Key Sector Statistics

Figure 1: Number of Organic Producers 2002



There are 923 registered organic producers in Ireland in 2002. Of this figure, 747 producers have attained full organic status while a further 176 are in the process of converting to organic farming methods.

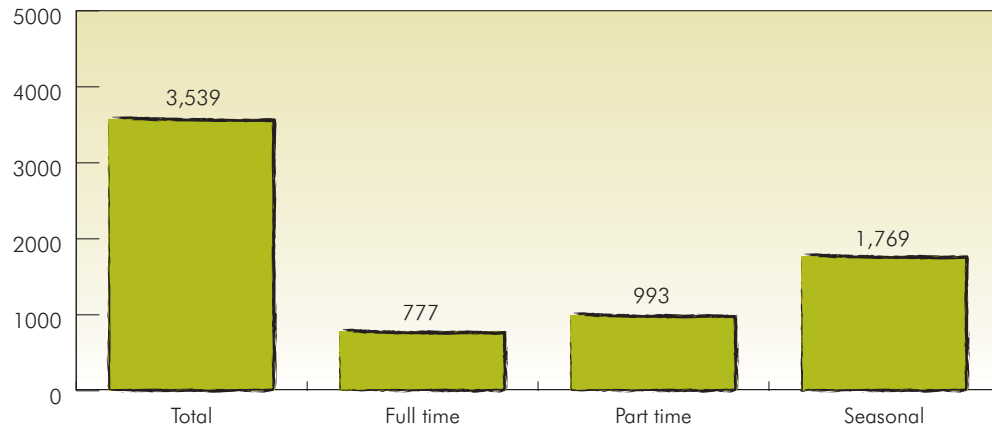
Figure 2: Organic Production Area 2002 (Hectares)



There are 29,850 hectares of land in organic production in Ireland in 2002. Of this 23,432 hectares are fully organic while 6,418 hectares is land in conversion to organic land.

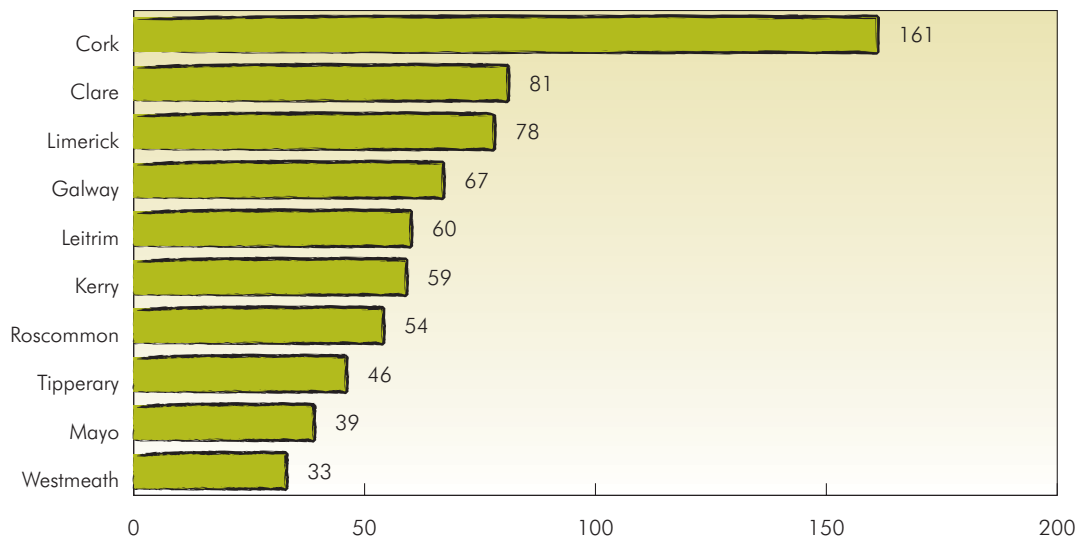


Figure 3: Employment in Organic Farming Sector 2002



The organic sector employs a total of 3,539 people in 2002. Of this figure, 777 work full-time, 993 work part-time, while the remainder are seasonal workers.

Figure 4: Number of Organic Producers by County 2002 (Top Counties)



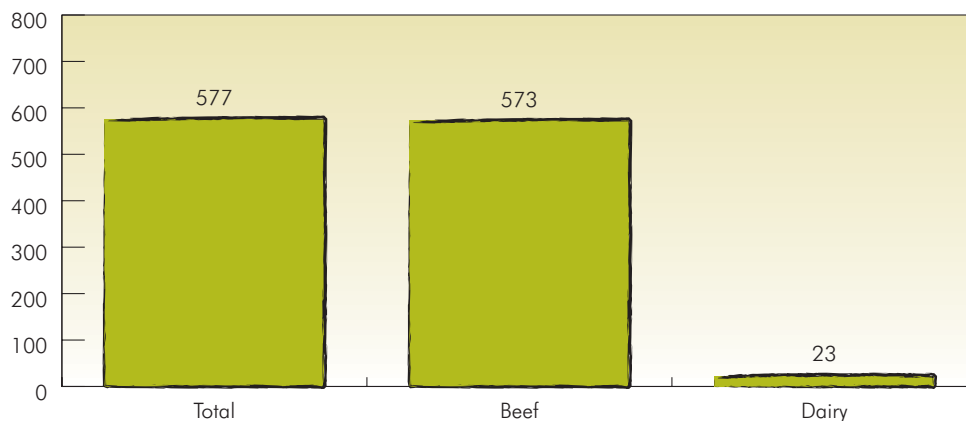
Cork has the most organic producers of any county. Cork's 161 producers make up one-sixth (17%) of all organic producers.

Organic production is concentrated in the south and west. The top nine counties in terms of number of organic producers are all in either Munster or Connacht.

An analysis of production area by county shows a very similar pattern (see Appendix Table 1). The provinces of Munster and Connacht account for almost three-quarters (73%) of total production area (Munster 51% of production area and Connacht 22%). Cork has the largest amount of organic land with 5,646 hectares.

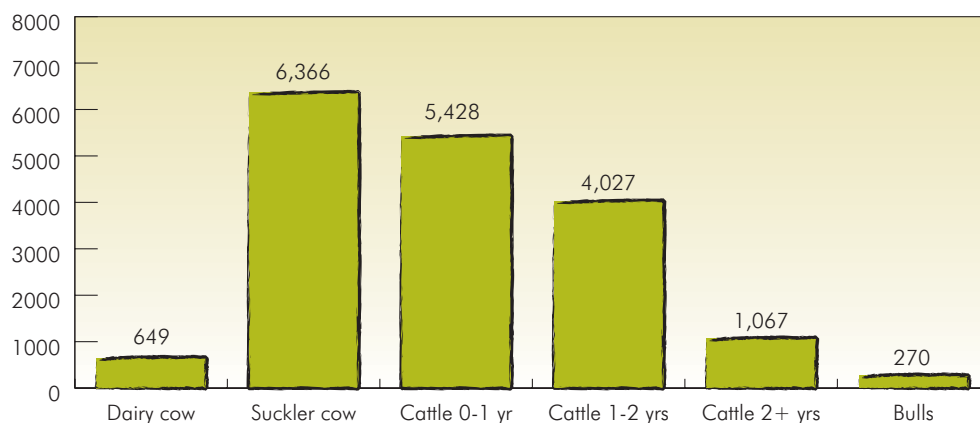
Section 2: Bovine Production

Figure 5: Number of Bovine Producers 2002



There are 577 bovine producers in Ireland in 2002. 573 producers are in beef production while 23 are dairy producers. (Note: some producers are both beef and dairy producers).

Figure 6: Number of Bovine Animals 2002

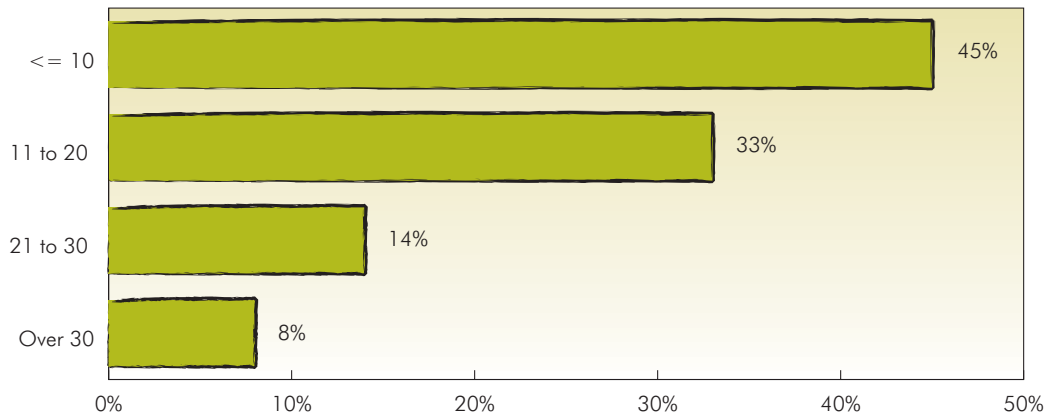


There are a total of 17,807 bovine animals in Ireland in 2002. Of these, 6,366 are suckler cows, 5,428 are 0-1 year old bovines, 4,027 are 1-2 year olds and 1,067 are 2+ year old bovines.

The dairy herd size is small, at only 649 animals.

A breakdown of bovine numbers by organic status is provided in Table 3 in the Appendix.

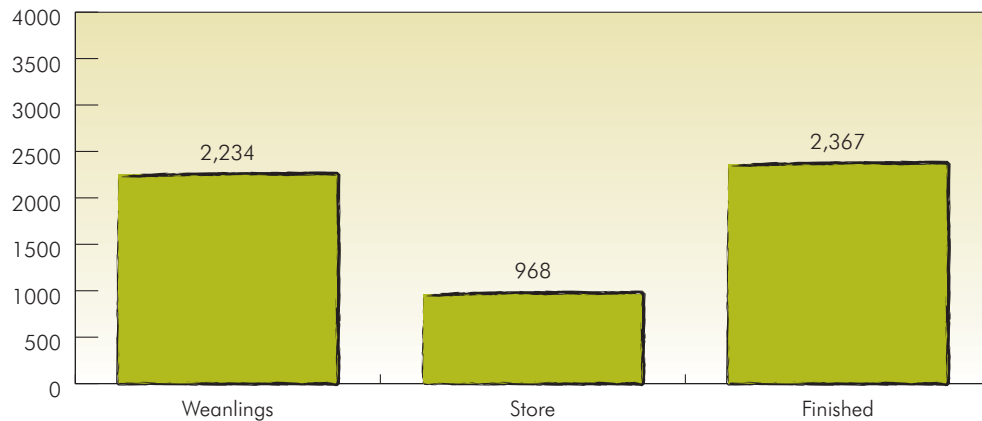
Figure 7: Suckler Herd Size 2002



Most beef producers have 20 or less suckler cows. 45% of suckler herds are 10 animals or less while 33% are between 11 and 20 animals. The average suckler herd size is 14.

Among the 23 dairy producers, the average herd size is 28, with an average milk output of 144,000 litres.

Figure 8: Number of Bovine Animals Sold 2002

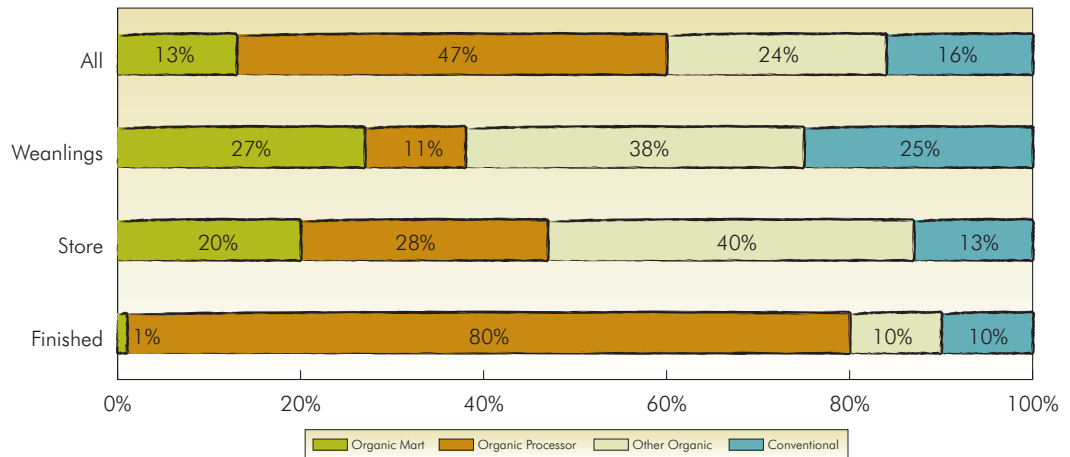


A total of 5,569 bovines were sold in 2002. Of these, 2,234 were weanlings, 968 were store cattle and 2,367 were finished cattle.

The average weights of animals sold were as follows: weanlings 276 kilos (live weight); store animals 408 kilos (live weight); and finished animals 325 kilos (carcass weight).



Figure 9: Sales Market for Bovines 2002

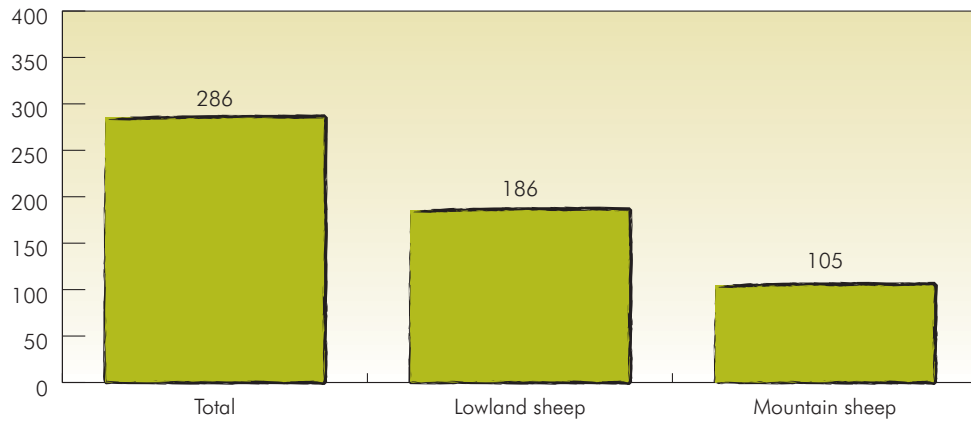


Most producers are able to find organic outlets for bovines and don't sell them as conventional animals. Of all the bovine animals sold in 2002, 13% were sold at organic marts, 47% were sold to organic processors and 24% were sold through other organic channels (e.g. other organic farmers). Only 16% were sold as non-organic animals.

Producers had most difficulty finding organic outlets for weanlings. 25% of weanlings were sold conventionally.

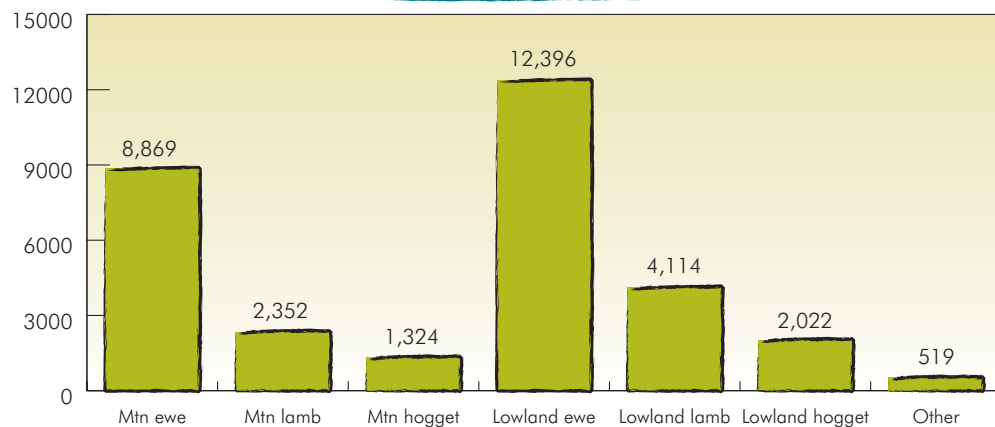
Section 3: Sheep Production

Figure 10: Number of Sheep Producers 2002



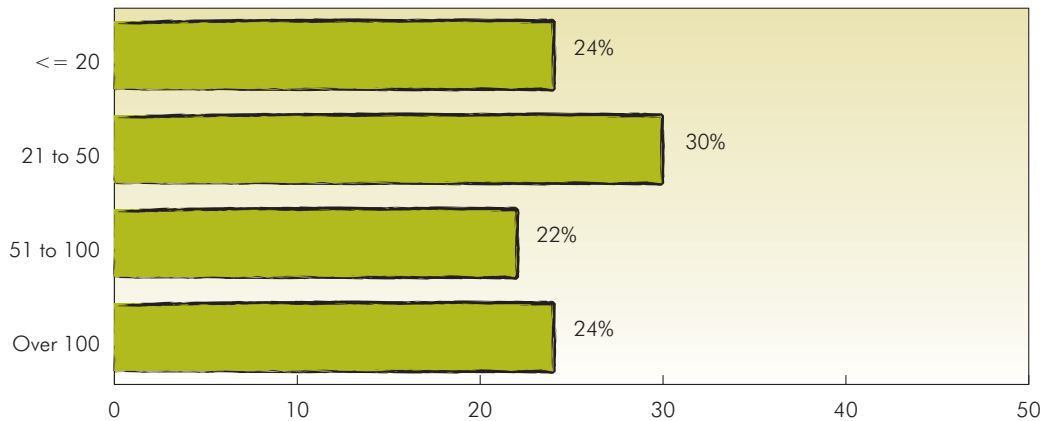
There are a total of 286 sheep producers in 2002. 186 producers have lowland sheep while 105 producers have mountain sheep. (Note: some producers have both lowland and mountain sheep).

Figure 11: Number of Sheep 2002



There are a total of 31,596 sheep in Ireland in 2002. Of this figure, 12,396 are lowland ewes and 8,869 are mountain ewes.

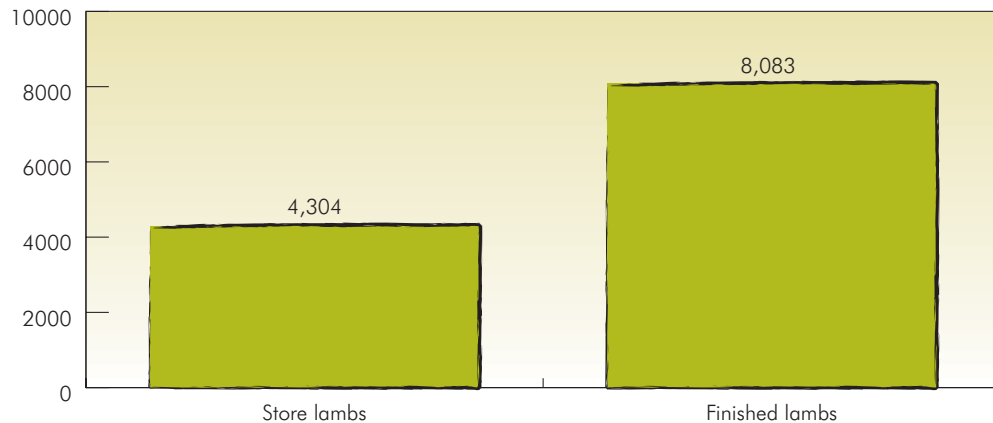
Figure 12: Lowland Sheep Flock Size 2002



24% of lowland sheep producers have 20 or less lowland ewes, 30% have between 21 and 50 lowland ewes, 22% have between 51 and 100 lowland ewes and 24% have over 100 lowland ewes. The average number of lowland ewes is 71.

Among mountain sheep producers, the average number of mountain ewes is 86.

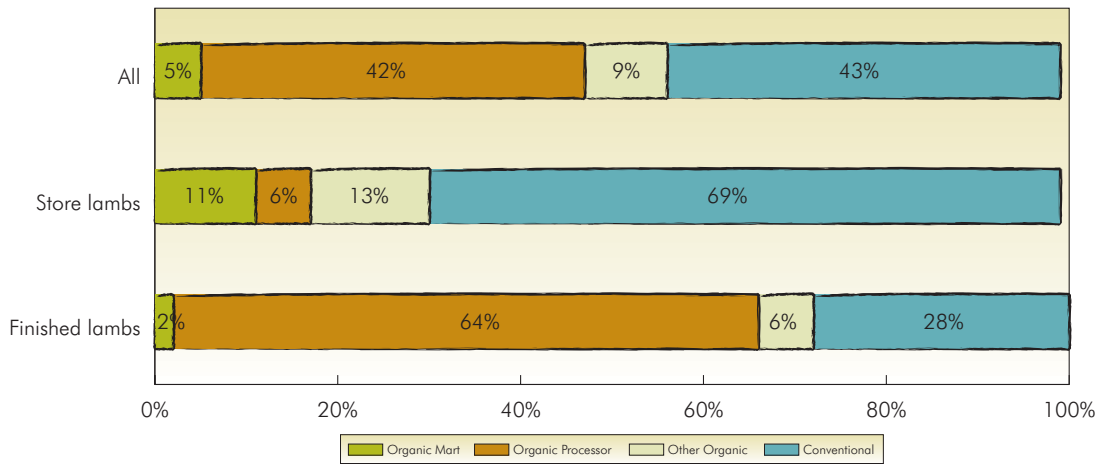
Figure 13: Number of Sheep Sold 2002



A total of 12,387 sheep were sold in 2002. Of these, 4,304 were store lambs and 8,083 were finished lambs.

The average weights of animals sold were as follows: store lambs 33 kilos (live weight); finished lambs 26 kilos (carcass weight).

Figure 14: Sales Market for Sheep 2002

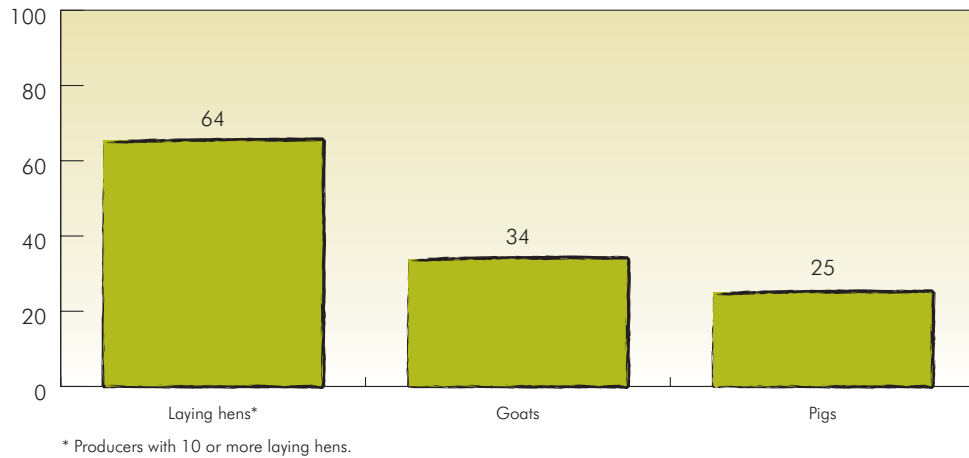


Of all the sheep sold in 2002, 43% were sold conventionally. Store lambs are the biggest problem area with 69% sold conventionally.



Section 4: Poultry, Goats & Pigs

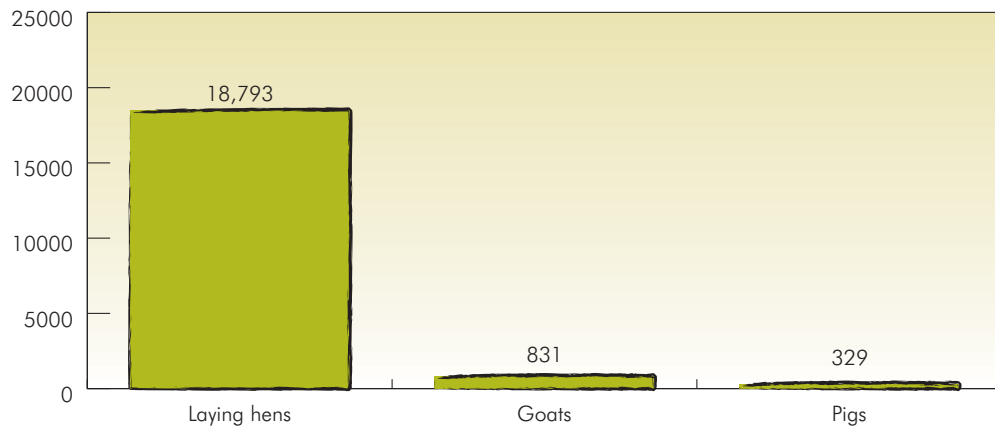
Figure 15: Number of Producers with Laying Hens, Goats & Pigs 2002



There are 64 producers with 10 or more laying hens, 34 producers with goats and 25 producers with pigs.

A breakdown of these figures by organic status, and producer numbers for broiler chickens, ducks, turkeys and geese are shown in Table 2 in the Appendix.

Figure 16: Number of Laying Hens, Goats & Pigs 2002

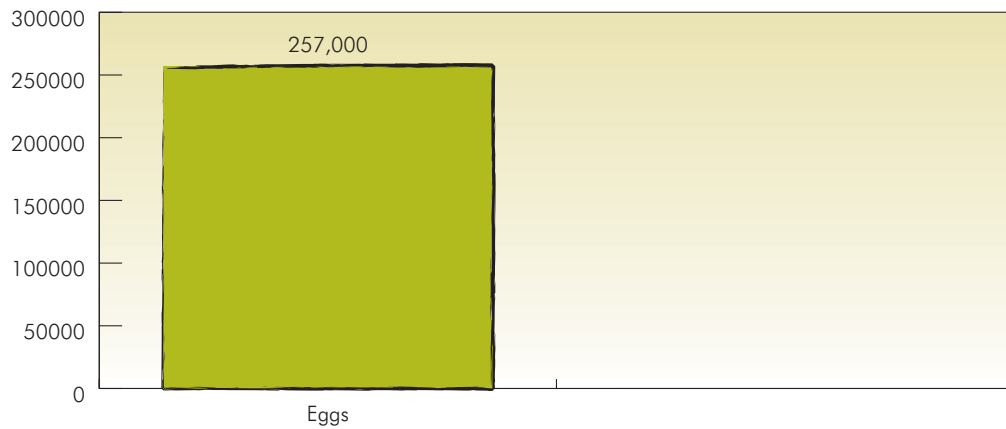


There are a total of 18,793 laying hens in Ireland in 2002, 831 goats and 329 pigs.

A breakdown of these figures by organic status and the number of broiler chickens, ducks, turkeys and geese are provided in Table 3 in the Appendix.



Figure 17: Number of Eggs Sold 2002



Approximately 257,000 eggs were sold in 2002.

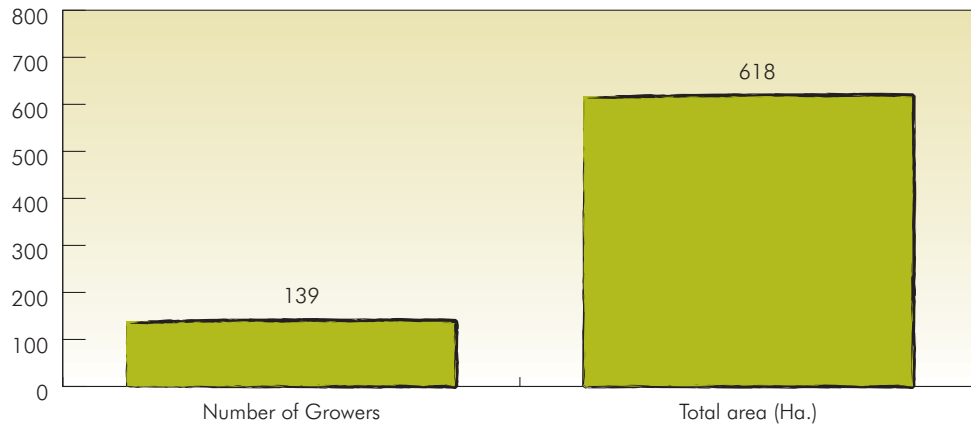
A figure for the number of pigs sold in 2002 is not available, due to an insufficient number of responses.

3,000 turkeys were sold in 2002 and 2,000 broiler chickens.



Section 5: Organic Crop Production

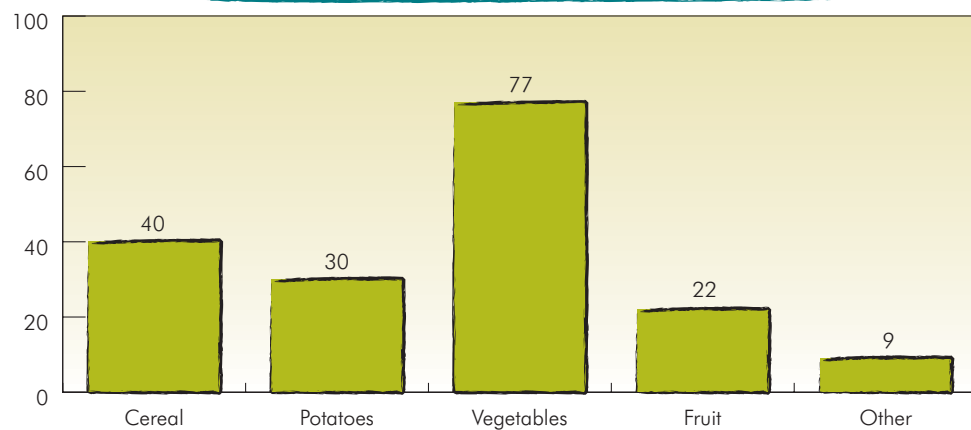
Figure 18: Number of Growers & Production Area for Organic Crops 2002



There are 139 growers of organic crops (this excludes those growing for their own consumption).

The total area of land in organic crop production is 618 hectares.

Figure 19: Number of Growers by Type of Organic Crop 2002

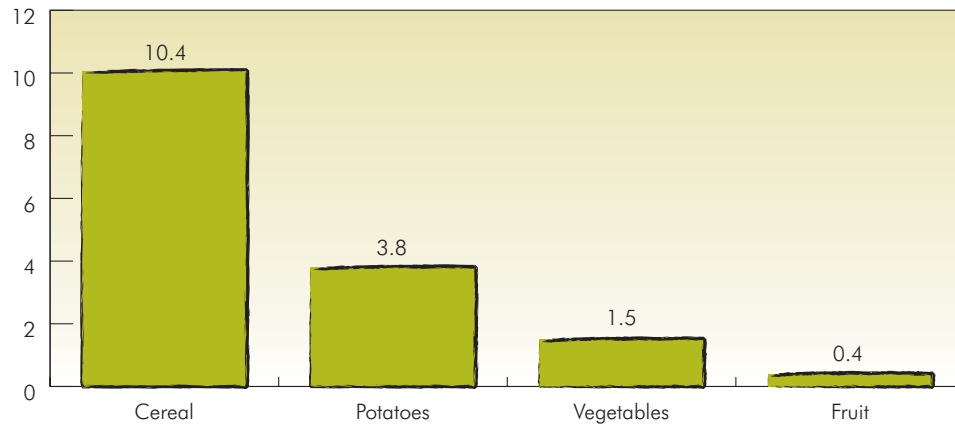


Most organic growers are in fruit and vegetable production. There are 77 growers of organic vegetables and 22 growers of organic fruit.

There are 40 growers of organic cereals and 30 organic potato growers.



Figure 20: Average Crop Area 2002 (Hectares)



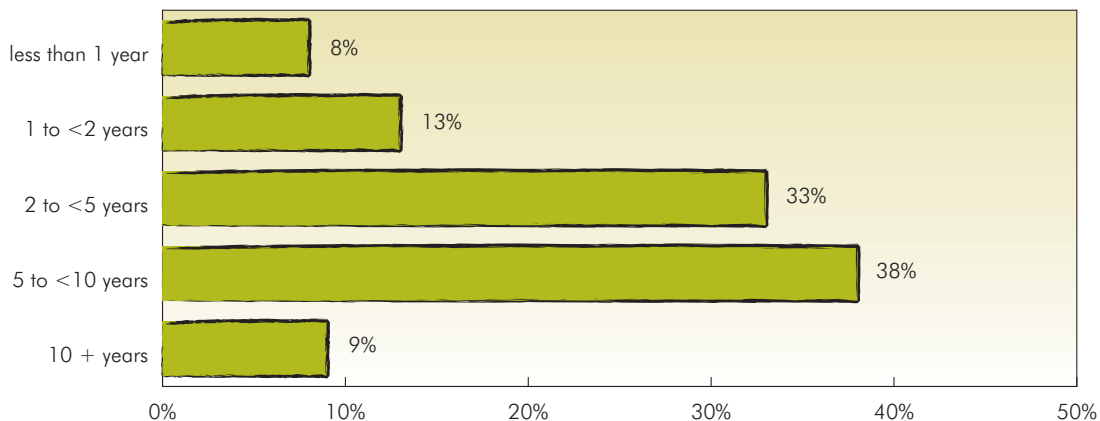
The average crop area for cereals is 10.4 hectares and for potatoes is 3.8 hectares. Reflecting the different nature of this type of horticulture, the average crop areas for vegetables and fruit are much smaller, 1.5 and 0.4 hectares respectively.

Some fruit production takes place in protected growing areas. The total area of polytunnels in 2002 is approximately 31,000 square metres (3.1 hectares). There are also approximately 5,000 square metres of glasshouses and 150 square metres of cloches/low tunnels.

The most important counties for cereal production are Wexford (18% of all cereal producers), Kildare (13%) and Tipperary (13%). The most important counties for vegetables are Cork (16% of all vegetable producers), Galway (12%), Wicklow (9%) and Clare (9%). (See Appendix Table 4).

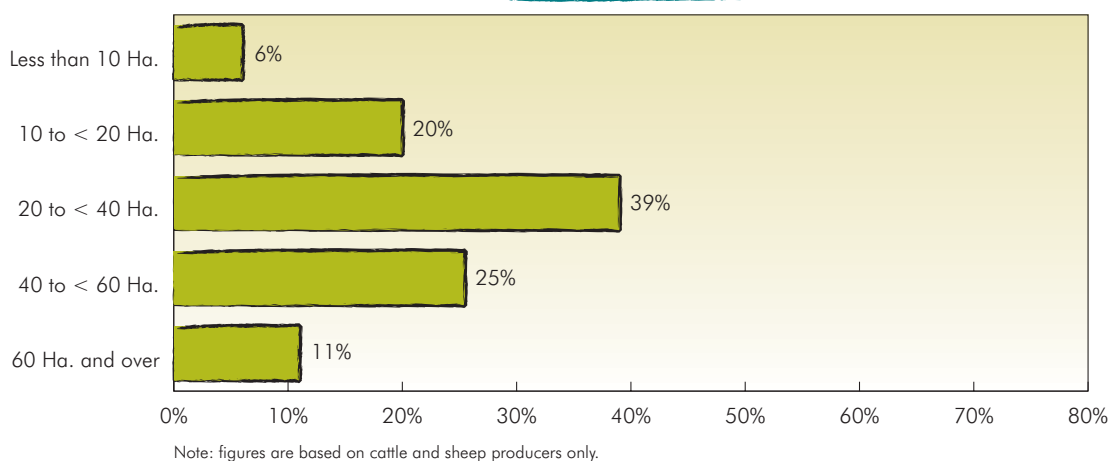


Figure 21: Number of Years Farming Organically



Most producers are experienced organic farmers. 33% of producers have been farming organically between 2 and 5 years, 38% have been farming organically between 5 and 10 years, while 9% have 10 or more years experience.

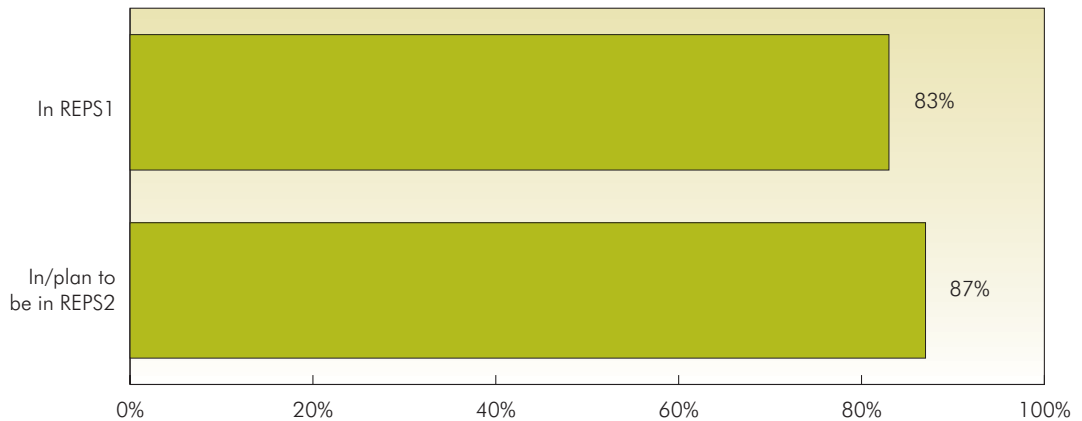
Figure 22: Farm Size 2002



6% have small organic farms of less than 10 hectares, 20% have farms of 10 to 20 hectares, 39% have farms between 20 and 40 hectares, 25% have farms between 40 and 60 hectares, while 11% have farms of 60 hectares or more.

The average organic farm is 35 hectares.

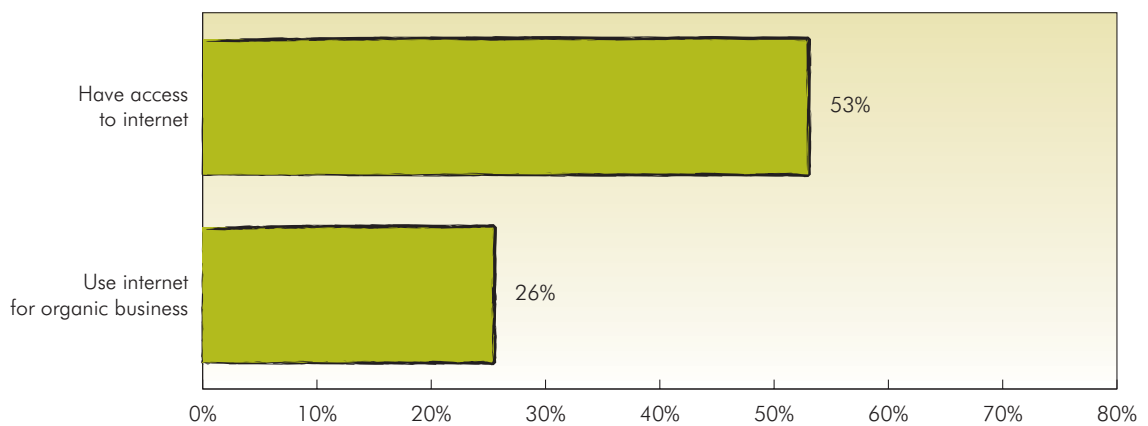
Figure 23: Participation in Rural Environment Protection Schemes



Most producers participate in the Rural Environment Protection Schemes (REPS).

Among those not participating, many cite the payment rate and the level of paperwork as deterrents.

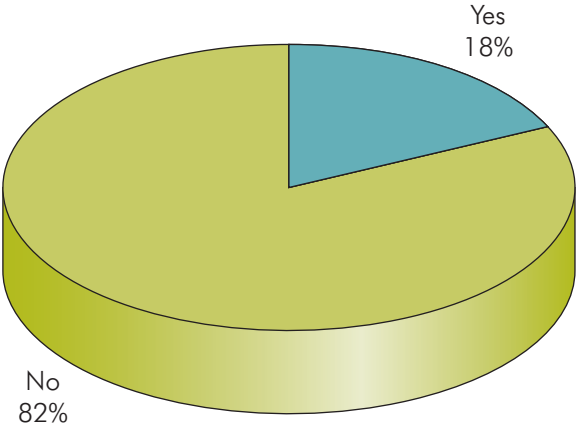
Figure 24: Internet Usage



Half (53%) of producers have access to the internet and a quarter (26%) use the internet for their organic business. The most commonly mentioned specific uses of the internet included sourcing certified raw materials (e.g. feed, seed, etc.) and general research on organic matters (often using international websites).



Figure 25: Is Producer a Member of a Producer Group?

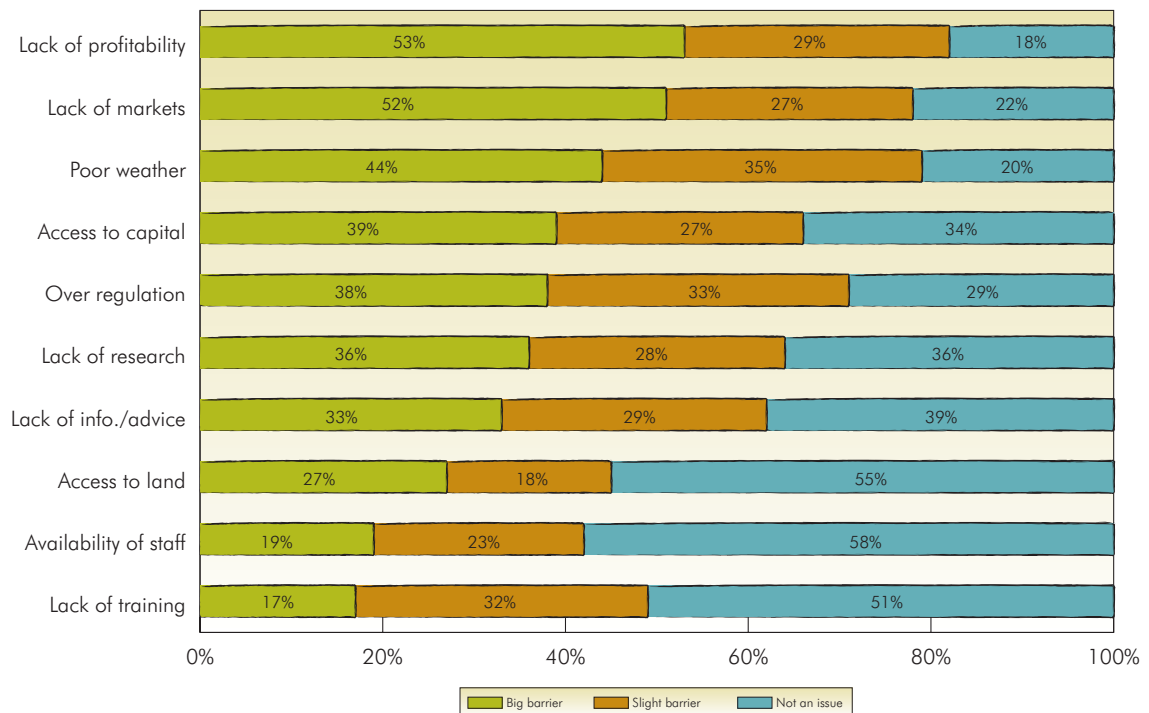


18% of producers are in a producer group.



Section 7: Barriers to Expansion

Figure 26: Barriers to Expansion



Producers were asked to rate ten issues in relation to how they affected their ability to expand their organic business. Producers also were asked to elaborate on what they saw as their main barriers.

Lack of profitability/lack of markets appears to be the biggest issue. Producers feel that consumer demand is not strong enough and consumers don't want to pay more for organic products. They say that the prices they receive for their output do not justify the higher costs associated with organic production. Access to capital is related to this issue as banks won't lend to businesses with low profits.

Lack of research/lack of information and advice is another barrier. This issue most often concerns situations where the producer needs very specific information on, for example, how to treat a particular animal or crop disease. Poor weather and over regulation/bureaucracy are also major concerns.

Different producer types see different barriers. For example, vegetable and cereal producers are less concerned about lack of profitability and lack of markets and more concerned about lack of research (see Appendix Table 5).



Table 1
Number of Producers and Area (Hectares) by County 2002*

| | Number of Producers | Area (Ha.) |
|-----------|---------------------|------------|
| Cork | 161 | 5,646 |
| Clare | 81 | 3,260 |
| Limerick | 78 | 2,634 |
| Galway | 67 | 1,838 |
| Leitrim | 60 | 1,726 |
| Kerry | 59 | 1,859 |
| Roscommon | 54 | 1,210 |
| Tipperary | 46 | 1,762 |
| Mayo | 39 | 1,102 |
| Westmeath | 33 | 1,122 |
| Sligo | 27 | 706 |
| Wicklow | 23 | 657 |
| Meath | 23 | 644 |
| Kildare | 23 | 547 |
| Wexford | 21 | 676 |
| Dublin | 18 | 794 |
| Offaly | 17 | 658 |
| Waterford | 17 | 562 |
| Kilkenny | 16 | 455 |
| Cavan | 14 | 414 |
| Monaghan | 11 | 262 |
| Donegal | 10 | 399 |
| Carlow | 7 | 277 |
| Longford | 7 | 202 |
| Laois | 6 | 280 |
| Louth | 5 | 143 |

* Figures are based on data from 853 producers and adjusted upwards to represent the 923 producers registered with the Department of Agriculture and Food as at 31st December 2002.

Table 2
Number of Producers by Livestock Type & Organic Status
(As at 31st December 2002)

Table 2.1 Cattle

| | Total Number of Producers | Producers with ASBP* animals | Producers with in conversion animals | Producers with organic animals |
|----------------|---------------------------|------------------------------|--------------------------------------|--------------------------------|
| Dairy cow** | 23 | 8 | 7 | 13 |
| Suckler cow | 448 | 211 | 92 | 215 |
| Cattle 0-1 yr | 456 | 83 | 103 | 281 |
| Cattle 1-2 yrs | 390 | 65 | 72 | 258 |
| Cattle 2+ yrs | 164 | 60 | 28 | 90 |
| Bulls | 213 | 96 | 52 | 69 |
| All bovines | 577 | 270 | 137 | 357 |

ASBP* Approved for symbol breeding purposes.

** Number of producers with three or more dairy cows (e.g. there are 23 producers with three or more dairy cows, 8 producers with three or more ASBP dairy cows, etc.)

How to read table: there are 448 producers with suckler bovines in Ireland in 2002. Of these, 211 producers have ASBP suckler bovines, 92 producers have in conversion suckler bovines and 215 producers have (non ASBP) organic suckler bovines. (Note: figures add to more than the total figure as a producer may be in more than one category).

Table 2.2 Sheep

| | Total Number of Producers | Producers with ASBP* animals | Producers with in conversion animals | Producers with organic animals |
|-----------------|---------------------------|------------------------------|--------------------------------------|--------------------------------|
| Mountain ewe | 103 | 45 | 24 | 40 |
| Mountain lamb | 42 | 12 | 4 | 28 |
| Mountain hogget | 32 | 9 | 8 | 15 |
| Lowland ewe | 174 | 81 | 32 | 80 |
| Lowland lamb | 83 | 11 | 12 | 61 |
| Lowland hogget | 65 | 13 | 16 | 38 |
| Other sheep | 179 | 85 | 37 | 61 |
| All sheep | 286 | 132 | 64 | 153 |

ASBP* Approved for symbol breeding purposes.

Appendix

Table 2.3 Goats

| | Total Number of Producers | Producers with ASBP* animals | Producers with in conversion animals | Producers with organic animals |
|------------------|---------------------------|------------------------------|--------------------------------------|--------------------------------|
| Breeding females | 28 | 11 | 8 | 10 |
| All other goats | 24 | 9 | 8 | 10 |
| All goats | 34 | 17 | 8 | 13 |

ASBP* Approved for symbol breeding purposes.

** Producers with more than one goat (e.g. there are 28 producers with more than one breeding female goat, 11 producers with more than one ASBP breeding female goat, etc.).

Table 2.4 Pigs

| | Total Number of Producers | Producers with ASBP* animals | Producers with in conversion animals | Producers with organic animals |
|------------------------|---------------------------|------------------------------|--------------------------------------|--------------------------------|
| Sow (farrow to finish) | 16 | 5 | 2 | 11 |
| Sow (farrow to weaner) | 6 | 2 | 1 | 3 |
| Finishing pig | 20 | 5 | 2 | 13 |
| All pigs | 25 | 10 | 3 | 18 |

ASBP* Approved for symbol breeding purposes.

Table 2.5 Poultry

| | Total Number of Producers | Producers with ASBP* animals | Producers with in conversion animals | Producers with organic animals |
|--------------|---------------------------|------------------------------|--------------------------------------|--------------------------------|
| Broiler hens | 11 | 1 | 2 | 8 |
| Laying hens | 64 | 17 | 10 | 40 |
| Turkeys | 5 | 0 | 2 | 3 |
| Ducks | 12 | 2 | 2 | 8 |
| Geese | 5 | 1 | 1 | 3 |
| All poultry | 72 | 18 | 12 | 46 |

ASBP* Approved for symbol breeding purposes.

** Producers with poultry numbers of 10 or more (e.g. there are 11 producers with 10 or more broiler hens, 1 producer with ten or more ASBP broiler hens, etc.).

Table 3
Number of Livestock by Type of Livestock & Organic Status
(As at 31st December 2002)

Table 3.1 Cattle

| | Total Number of Animals | Total number of ASBP* animals | Total number of in conversion animals | Total number of organic animals |
|----------------|-------------------------|-------------------------------|---------------------------------------|---------------------------------|
| Dairy cow** | 649 | 142 | 292 | 215 |
| Suckler cow | 6,366 | 2,532 | 1,406 | 2,428 |
| Cattle 0-1 yr | 5,428 | 902 | 1,247 | 3,279 |
| Cattle 1-2 yrs | 4,027 | 683 | 607 | 2,737 |
| Cattle 2+ yrs | 1,067 | 393 | 170 | 504 |
| Bulls | 270 | 127 | 60 | 83 |
| All bovines | 17,807 | 4,779 | 3,782 | 9,246 |

ASBP* Approved for symbol breeding purposes.

How to read table: there are a total of 6,366 suckler bovines in Ireland in 2002. Of these, 2,532 are ASBP suckler bovines, 1,406 are in conversion suckler bovines and 2,428 are (non ASBP) organic suckler bovines.

Table 3.2 Sheep

| | Total Number of Animals | Total number of ASBP* animals | Total number of in conversion animals | Total number of organic animals |
|-----------------|-------------------------|-------------------------------|---------------------------------------|---------------------------------|
| Mountain ewe | 8,869 | 3,473 | 2,336 | 3,060 |
| Mountain lamb | 2,352 | 463 | 230 | 1,659 |
| Mountain hogget | 1,324 | 277 | 318 | 729 |
| Lowland ewe | 12,396 | 5,245 | 2,178 | 4,973 |
| Lowland lamb | 4,114 | 859 | 315 | 2,940 |
| Lowland hogget | 2,022 | 460 | 474 | 1,088 |
| Other sheep | 519 | 206 | 99 | 214 |
| All sheep | 31,596 | 10,983 | 5,950 | 14,663 |

ASBP* Approved for symbol breeding purposes.

Appendix

Table 3.3 Goats

| | Total Number of Animals | Total number of ASBP* animals | Total number of in conversion animals | Total number of organic animals |
|------------------|-------------------------|-------------------------------|---------------------------------------|---------------------------------|
| Breeding females | 581 | 148 | 36 | 397 |
| All other goats | 250 | 52 | 27 | 171 |
| All goats | 831 | 200 | 63 | 568 |

ASBP* Approved for symbol breeding purposes.

Table 3.4 Pigs

| | Total Number of Animals | Total number of ASBP* animals | Total number of in conversion animals | Total number of organic animals |
|----------------|-------------------------|-------------------------------|---------------------------------------|---------------------------------|
| Sows** | 67 | 22 | 5 | 40 |
| Finishing pigs | 262 | 29 | 10 | 223 |
| All pigs | 329 | 51 | 15 | 263 |

ASBP* Approved for symbol breeding purposes.

** Breakdown by type of sow withheld in order to protect confidentiality of individual producers.

Table 3.5 Poultry

| | Total Number of Animals | Total number of ASBP* animals | Total number of in conversion animals | Total number of organic animals |
|--------------|-------------------------|-------------------------------|---------------------------------------|---------------------------------|
| Broiler hens | 1,935** | - | - | - |
| Laying hens | 18,793 | 1,622 | 671 | 16,500 |
| Turkeys | *** | *** | *** | *** |
| Ducks | 477 | 38 | 120 | 319 |
| Geese | 117** | - | - | - |
| All poultry | 21,685 | 1,690 | 1,230 | 18,765 |

ASBP* Approved for symbol breeding purposes.

** Breakdown by organic status withheld to protect confidentiality of individual producers.

*** Insufficient data.

Table 4
County Distribution by Type of Producer 2002

Note: figures are rounded to nearest whole percent.

| | All Producers | Bovine Producers | Sheep Producers | Cereal Growers | Vegetable Growers |
|-----------|---------------|------------------|-----------------|----------------|-------------------|
| Cork | 17% | 13% | 25% | 8% | 16% |
| Clare | 9% | 11% | 6% | 0% | 9% |
| Limerick | 8% | 11% | 3% | 3% | 3% |
| Galway | 7% | 7% | 7% | 5% | 12% |
| Leitrim | 6% | 8% | 4% | 0% | 7% |
| Kerry | 6% | 6% | 5% | 0% | 4% |
| Roscommon | 6% | 5% | 5% | 0% | 5% |
| Tipperary | 5% | 6% | 5% | 13% | 5% |
| Mayo | 4% | 4% | 5% | 0% | 1% |
| Westmeath | 4% | 4% | 4% | 5% | 0% |
| Sligo | 3% | 3% | 4% | 0% | 1% |
| Wicklow | 3% | 2% | 5% | 5% | 9% |
| Wexford | 2% | 2% | 4% | 18% | 5% |
| Kildare | 2% | 2% | 2% | 13% | 5% |
| Meath | 2% | 2% | 2% | 3% | 1% |
| Offaly | 2% | 2% | 2% | 8% | 5% |
| Waterford | 2% | 2% | 1% | 8% | 1% |
| Cavan | 2% | 2% | 1% | 0% | 0% |
| Dublin | 2% | 1% | 2% | 0% | 3% |
| Kilkenny | 2% | 1% | 1% | 5% | 3% |
| Monaghan | 1% | 1% | 1% | 0% | 0% |
| Carlow | 1% | 1% | 2% | 0% | 1% |
| Donegal | 1% | 1% | 2% | 5% | 1% |
| Longford | 1% | 1% | 1% | 3% | 0% |
| Laois | 1% | 1% | 1% | 0% | 0% |
| Louth | 1% | 1% | 0% | 0% | 0% |

How to read table: 17% of all producers are in Cork county. Among producer sub-categories, 13% of bovine producers, 25% of sheep producers, 8% of cereal growers and 16% of vegetable growers are in Cork county.

Table 5
Barriers to Expansion by Type of Producer 2002

Note: figures are rounded to nearest whole percent.

| | All Producers | Bovine Producers | Sheep Producers | Cereal Growers | Vegetable Growers |
|-----------------------|---------------|------------------|-----------------|----------------|-------------------|
| Lack of profitability | 53% | 37% | 44% | 36% | 30% |
| Lack of markets | 52% | 26% | 28% | 44% | 24% |
| Poor weather | 44% | 16% | 17% | 33% | 53% |
| Access to capital | 39% | 55% | 54% | 46% | 44% |
| Over regulation | 38% | 59% | 46% | 23% | 32% |
| Lack of research | 36% | 33% | 38% | 50% | 50% |
| Lack of info./advice | 33% | 37% | 39% | 43% | 42% |
| Access to land | 27% | 44% | 43% | 35% | 30% |
| Availability of staff | 19% | 16% | 17% | 23% | 32% |
| Lack of training | 17% | 41% | 41% | 14% | 13% |

How to read table: 53% of all producers rated 'lack of profitability' as a big barrier to expansion. Among producer sub-categories, 59% of bovine producers, 46% of sheep producers, 36% of cereal growers and 30% of vegetable growers rated 'lack of profitability' as a big barrier to expansion.



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