

Who will Grow Ireland's Food? Rethinking Policy for a New Generation of Horticulture Entrepreneurs

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Who Will Grow Ireland's Food? Rethinking Policy for a New Generation of Horticulture Entrepreneurs

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Abstract

Ireland's horticulture sector faces a growing generational challenge that poses risks to both food security and climate objectives. This paper examines the barriers facing new entrants and argues that current policy frameworks do not fully reflect the realities of modern horticulture.

Rather than viewing growers solely as producers, the paper highlights the need to support them as entrepreneurs operating within increasingly complex agri-food supply chains. In this context, factors such as bargaining power and the way supply chains are established play a decisive role in determining whether new entrants can build viable and sustainable businesses.

The paper argues that policy should move beyond a narrow focus on productivity and place greater emphasis on improving market conditions and reducing structural barriers to entry. Doing so will be essential to ensuring generational renewal and building a more resilient and robust Irish food system.

Introduction

Ireland's climate and agricultural debates are increasingly focused on emissions, nitrates, land use, and livestock systems. Yet a more fundamental question remains largely overlooked: who will grow Ireland's food in the coming decades? This is not only a demographic issue, but a strategic challenge for the future of the Irish food system.

With the average Irish farmer approaching 60 years of age and only 4% under 35 (Central Statistics Office, 2023), generational renewal is no longer a future concern, but an immediate policy challenge. Without effective generational renewal, particularly in

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horticulture, Ireland risks increasing its dependence on imports and weakening the long-term viability of its food system.

This paper argues that the future of Irish horticulture depends not only on productivity, but on whether policy frameworks recognise and support young growers as entrepreneurs operating within complex agri-food supply chains. It shows that sector viability is shaped not just by production conditions, but by how supply chains are organised, how value is distributed, and how power is shared between actors.

Why horticulture remains overlooked in Irish policy

Horticulture accounts for approximately 2% of Irish farmland, yet it is the part of agriculture most directly linked to the food consumed domestically. The sector generates around €520 million annually and supports over 6,000 jobs (Department of Agriculture, Food and the Marine, 2023), highlighting its importance beyond its relatively small land footprint. Despite this, Irish agriculture remains overwhelmingly oriented towards grassland and livestock systems, which account for over 94% of land use (Central Statistics Office, 2023). This imbalance continues to shape policy priorities and investment decisions, often leaving horticulture at the margins of public debate.

The result is a persistent paradox: the sector most closely tied to everyday food consumption remains marginal in national agricultural and climate debates. This limited visibility affects not only current production, but also the sector's future capacity to meet domestic demand. In addition, policy frameworks have traditionally focused on output and efficiency, while paying less attention to how value is distributed along supply chains. However, research shows that outcomes in agri-food systems are strongly shaped by how actors work together in practice, including trust and commitment, which underpin cooperation across the supply chain (Heide and John, 1992; Morgan and Hunt, 1994).

More recent evidence reinforces the importance of these dynamics. Studies of European agri-food supply chains show that relationships between actors, especially in contexts of high dependence and coordination, play a decisive role in shaping performance and stability (Assis, Souza and Zylbersztajn, 2022; Gajdić, Kotzab and Petljak, 2023). In horticulture, where margins are tight and products are highly perishable, these dynamics are not secondary; they are central to economic viability.

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A generational challenge with structural roots

The horticulture sector is under increasing demographic pressure, with an ageing grower base and limited entry of younger producers. At the same time, input costs have risen sharply in recent years, placing additional strain on already narrow margins (Teagasc, 2025). For many existing producers, limited bargaining power within supply chains makes it difficult to pass on rising costs. For potential entrants, this translates into a sector perceived as high-risk and low-return.

Younger generations are increasingly unlikely to view farming as a guaranteed inheritance. Instead, they approach it as a business that needs to be economically viable and worth committing to over time. At the same time, entry barriers remain significant. Access to land and finance, as well as secure routes to market, continues to constrain new entrants. These challenges are not only economic but also linked to how supply chains are organised and how power is distributed within them.

Structural constraints and market dynamics

Irish horticulture depends heavily on a limited number of buyers and export markets, particularly the UK. This is especially evident in segments such as the mushroom industry, where export dependence on the UK market remains significant (Teagasc, 2022). This concentration reduces growers' ability to diversify and weakens their negotiating position within the supply chain. However, dependence is not necessarily a problem in itself. In supply chains, it can provide stability and support longer-term planning. The key issue is how this dependence interacts with bargaining power, particularly in situations of interdependence between actors (Scheer, Miao and Palmatier, 2015).

Where power is unevenly distributed, dependence can translate into vulnerability, limiting flexibility and reducing returns. By contrast, when growers have some bargaining capacity, either individually or through collective structures, dependence can support cooperation and enable longer-term investment. Recent research shows that these dynamics are shaped by the interaction between dependence and power and by how relationships are managed in practice (Gajdić, Kotzab and Petljak, 2023; Russo *et al.*, 2023). In this context, cooperation plays a central role in turning

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commitment into better outcomes and improved supply chain performance (Nyaga, Whipple and Lynch, 2010).

Evidence from Mediterranean horticulture systems further illustrates that coordinated models, such as producer organisations and cooperatives, play a crucial role in balancing bargaining power and improving sector performance (Pérez-Mesa *et al.*, 2021). These findings show that outcomes depend not only on market conditions, but also on how relationships across the supply chain are organised.

What Ireland can learn from Spain's horticulture model

Spain offers a useful point of comparison for Ireland. In regions such as Almería and Murcia, a highly competitive horticulture sector has developed through networks of small and medium-sized producers operating within coordinated systems. This success is not explained only by technology or scale, but by how the sector is organised. Strong producer organisations, cooperative models, and long-term relationships with buyers help balance bargaining power and create more stable conditions for growers.

These arrangements support stronger relationships across the supply chain, building trust and commitment and enabling more effective coordination. As a result, growers are better able to respond to market demands while maintaining viable businesses. The Spanish experience shows that sector resilience depends not only on efficiency, but also on how supply chains are organised and how relationships between actors are managed.

Changing skills, expectations, and entry barriers

The profile of the modern grower is changing. Beyond technical production skills, success increasingly depends on business and market-oriented capabilities. At the same time, younger generations place greater emphasis on working conditions and quality of life. These expectations do not conflict with agricultural activity, but they do require different organisational and economic conditions.

However, barriers remain significant for new entrants, particularly in accessing land and securing finance. As recent research shows, access to land in particular remains a key structural barrier, shaped not only by economic factors but also by institutional

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and cultural dynamics (Curtin *et al.*, 2024). These constraints continue to limit both entry into the sector and the retention of younger and more diverse participants.

A new profile is emerging: the grower as entrepreneur. This shift has important policy implications, requiring a move beyond traditional agricultural support towards approaches that reflect the realities of modern agri-food businesses.

Horticulture within climate and food policy

Horticulture plays an important but often overlooked role in both climate and food policy. Increasing domestic production of fruit and vegetables can reduce reliance on imports, improve food security, lower transport-related emissions, and strengthen the capacity of the food system. Recent Bord Bia data also highlights the importance of strengthening domestic supply in the context of evolving market conditions (Bord Bia, 2024). This is consistent with existing policy frameworks. Ireland's Food Vision 2030 strategy highlights sustainability and competitiveness in the agri-food sector, yet horticulture remains relatively underdeveloped within this agenda (Government of Ireland, 2021). At European level, the Farm to Fork Strategy calls for more sustainable and transparent food systems, including better functioning supply chain relationships (European Commission, 2020).

Despite these policy directions, horticulture is still not fully integrated into climate and food system discussions. A more coherent approach would place the sector at the centre of sustainable food systems, rather than treating it as a peripheral activity.

Policy recommendations

Ensuring the long-term viability of Ireland's horticulture sector requires a shift in policy focus, from production alone to the broader conditions that shape how the sector operates.

First, improving access to land and finance is essential to lower barriers to entry and support generational renewal. Without this, new entrants will continue to face structural constraints that limit their ability to establish viable businesses.

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Second, strengthening producer organisations and cooperative models can improve growers' bargaining power and create more balanced relationships within supply chains.

Third, policy should address how value is distributed along the supply chain. Reducing imbalances between growers and buyers is key to improving income stability and enabling longer-term planning and investment.

Finally, greater emphasis should be placed on developing business and market-oriented capabilities, reflecting the increasingly entrepreneurial nature of horticulture.

At the same time, horticulture needs to be more fully integrated into national food and climate policy. Recognising its role in reducing import dependence and supporting domestic production would align the sector more closely with broader policy objectives.

Conclusion

Ireland's horticulture sector faces a structural and generational challenge that cannot be addressed through productivity improvements alone. Without more targeted and coherent policy support, the sector risks further decline, increasing reliance on imports and weakening the capacity of the food system.

The key issue is not whether younger generations are willing to engage in agriculture, but whether existing conditions allow them to build viable businesses. Addressing this requires a shift in perspective: from viewing growers as price-takers within supply chains to recognising them as entrepreneurs operating within complex systems shaped by power, dependence, and cooperation.

Without such a shift, policy risks addressing symptoms rather than the underlying causes of decline in Irish horticulture.

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