THE ECONOMY
THE ECONOMY

This section provides an overview of the current position in relation to the three main sectors: agriculture, manufacturing and internationally traded services, and other services including tourism.

4.1 AGRICULTURE

Whilst County Kildare is well known for its rich pasturelands, 32% of land in the county is considered marginal. In this way, there are very diverse agricultural practices in Kildare from the thriving horse industry to the harvesting of peat from the bogland in the west.

Table 9: Principal characteristics of agriculture: Kildare compared with the State, 1991 & 2000

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Avg. farm size (ha.)</td>
<td>37.8</td>
<td>41.8</td>
<td>26</td>
<td>31.4</td>
</tr>
<tr>
<td>Avg. farm size (ESUs)*</td>
<td>15.3</td>
<td>27.9</td>
<td>11.6</td>
<td>20.7</td>
</tr>
<tr>
<td>% farmers aged &gt;65</td>
<td>20.5</td>
<td>19.9</td>
<td>22.8</td>
<td>19.8</td>
</tr>
<tr>
<td>Marginal land % of total</td>
<td>32</td>
<td>32</td>
<td>49</td>
<td>49</td>
</tr>
<tr>
<td>Specialist tillage %</td>
<td>11.8</td>
<td>14.8</td>
<td>2.9</td>
<td>3.3</td>
</tr>
<tr>
<td>Specialist dairying %</td>
<td>11.4</td>
<td>8.4</td>
<td>24.4</td>
<td>18.6</td>
</tr>
<tr>
<td>Specialist beef production %</td>
<td>31.9</td>
<td>39.6</td>
<td>42.1</td>
<td>51</td>
</tr>
<tr>
<td>Specialist sheep %</td>
<td>10.9</td>
<td>8.8</td>
<td>8.8</td>
<td>8.7</td>
</tr>
<tr>
<td>Mixed grazing livestock %</td>
<td>24.6</td>
<td>18.9</td>
<td>17.9</td>
<td>14.6</td>
</tr>
<tr>
<td>Mixed crops &amp; livestock %</td>
<td>7.4</td>
<td>7.3</td>
<td>2.5</td>
<td>2.6</td>
</tr>
</tbody>
</table>

The average farm size (measured in both hectares and output levels) in Kildare is well above the national average throughout most of the county and especially in the south. Smaller farms are mostly concentrated in the north, midlands and west of the county as well as some pockets east of Naas (Map 48 & 49). The highest levels of farm output are mostly associated with the south-west (Map 50), which is mainly a specialist beef farming area. The decline in the number of farms by 557 in the 1990s resulted in some enlargement of the remaining farms. Throughout the county there were both increases and decreases in farm size between 1991 and 2000. The largest increases were in areas west of Allenwood, south of Newbridge, around Kilberry and more unexpectedly around Leixlip. The greatest decreases were, as expected, observed in the hinterlands of growing urban centres like Newbridge and Kildare, and also to the south east and north east of Athy, east of Johnstown, south of Prosperous and a couple of districts in the west (Map 49). The pattern of change in the economic value of agricultural output demonstrates some contrasts between the north and the south of the county with the greatest improvements in economic value in districts south of Kildare, around Rathangan, Clane and more unexpectedly, Celbridge and Leixlip (Map 51).
Kildare has approximately the same percentage of farmers aged over sixty-five as the State. There has been an increase in the percentage of those involved in both Specialist tillage and specialist beef production in Co. Kildare since 1991 and a decrease in the percentage of those involved in all other farming activities. Compared with the State Kildare had a higher proportion of specialist tillage, mixed grazing and mixed crops and livestock than the State, but proportionally less dairy and beef farmers. The extent of local specialisation in farm types is summarised in Maps 52-56. Specialised beef production is by far the most common type of farming accounting for almost 40% of the total farms in 2000 (Table 9). Beef farming is particularly strongly represented in the south west of the county around Athy (Map 52). Mixed grazing livestock is the second most common type of farming, though the number of farms in this sector has declined from 799 in 1991 to 508 in 2000. They are mostly associated with some of the best pastures, especially in the east of the county, east of Newbridge and around Kilcock (Map 53). Specialised tillage farming accounts for 14.7% of all farms in Kildare in 2000 and is the only other farming sector apart from beef farming to have experienced an increase between 1991 and 2000 in Kildare (from 382 in 1991 to 400 in 2000). Tillage farming is mainly concentrated in the east of the county especially in the area east of Naas and south of Newbridge (Map 54). Specialised sheep farming accounts for 237 farms in Kildare in 2000, compared with 353 in 1991 and its relative importance is greatest in the north west of the county (Map 55). Specialised dairy farming is less restricted geographically with pockets of high proportions of this type of farming to the south-west of Naas, west of Straffan, around Kilberry and Rathangan and near Castledermot in the south (Map 56). Specialised dairying also has experienced a decline from 369 farms in 1991 to 227 in 2000.

There have been a number of policy changes since the early 1990s following the CAP reforms, that have influenced the patterns of agricultural production and activity in Co. Kildare. The focus of agricultural policy has moved away from direct price supports and has been replaced by a system of direct payments to farmers. It is likely that there will be a further increase in part-time farming, particularly among those rearing beef cattle. Greater emphasis is likely to be placed on more environmentally sustainable agriculture and it is also anticipated that more farmers will participate in the Rural Environmental Protection Scheme (REPS). Already there is a high level of participation in a number of districts in the north-west of the county, around Monasterevin, Clane and Ballymore-Eustace where farms are generally small and less intensive (Maps 57 & 58).

Kildare is the country’s most important centre for the bloodstock industry. A number of internationally known stud farms are located in the county. The horse industry is of considerable importance economically. It directly employs 5,500 people with a further 10,000 in associated industries and services, according to a report produced by the Kildare Agricultural Task Group (Kildare Agricultural Task Group, 2000).
MAP 48: AVERAGE SIZE FARM (HA) 2000

Transport
- Railway
- Motorway
- Primary Roads
- Secondary Roads

Towns By Pop.
- > 10,000
- 3,000 - 9,999
- < 3,000

Hectares
- No farm data
- < 32
- 32 - 44
- 44 - 57
- 57 - 72
- > 72

Average = 42.91
Std. Dev = 14.27

Reproduced from Ordnance Survey Ireland Kildare 2004/07 CCMA
Data Source: Central Statistics Office Agricultural Census SAPS file 2000
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Kildare County Development Board
Rural-Urban Dynamics in Kildare: Socio-economic Patterns and Trends
MAP 50: AVERAGE FARM SIZE (ESU’s*) AS A PERCENTAGE OF TOTAL FARMS 2000

Kildare County Development Board
Rural-Urban Dynamics in Kildare: Socio-economic Patterns and Trends
MAP S1: AVERAGE FARM SIZE (ESU’s*) PERCENTAGE CHANGE 1996 - 2000

Transport
- Railway
- Motorway
- Primary Roads
- Secondary Roads

Towns By Pop.
- > 10,000
- 3,000 - 9,999
- < 3,000

Percentage Change
- No farm data
- < 36
- 36 - 84
- 84 - 153
- 153 - 270
- > 270

Average = 97.63
Std. Dev = 119.87

*1 ESU = €1,200 of Standard Gross Margin

Reproduced from Ordnance Survey Ireland Kildare 2004/07 CCMA
Data Source: Central Statistics Office AgriCultural Census SAIPS files 1996 & 2000
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MAP 52: SPECIALIST BEEF FARMS AS A PERCENTAGE OF TOTAL FARMS, 2000
MAP 54: SPECIALIST TILLAGE* FARMS AS A PERCENTAGE OF TOTAL FARMS, 2000

*Tillage crops contributes to >2/3 of total standard gross margin

Reproduced from Ordnance Survey Ireland Kildare 2004/07 CCWA
Data Source: Central Statistics Office Agricultural Census SAPS 2000
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MAP S6: SPECIALIST DAIRY FARMS AS A PERCENTAGE OF TOTAL FARMS, 2000

Kildare County Development Board
Rural-Urban Dynamics in Kildare: Socio-economic Patterns and Trends
MAP 57: FARMS IN REPS 1 & REPS 2 AS A PERCENTAGE OF TOTAL FARMS, 2000

Kildare County Development Board
Rural-Urban Dynamics in Kildare: Socio-economic Patterns and Trends
MAP 58: AREA (HA) IN REPS 1 & REPS 2 AS A PERCENTAGE OF TOTAL FARM LAND, 2000
4.2 MANUFACTURING AND INTERNATIONALLY TRADED SERVICES

An analysis of the industrial profile is summarised in Table 9, with comparative data for the other counties in the Mid-East region. Kildare has significantly higher numbers employed in high value added sectors than either Wicklow or Meath and, in addition, the rate of increase in employment in Kildare is much higher than in the other counties. The foreign owned sector accounted for 69% of all employment in Kildare compared with 41% in Wicklow and 25% in Meath. Total employment in foreign owned firms rose by 3,908 between 1999 and 2004 in Kildare. The GVA per person employed is greater than the national average in Kildare at 104.4 in 2002 (Table 10).

Table 10: Industrial indicators for Dublin and Mid East counties

<table>
<thead>
<tr>
<th></th>
<th>Kildare</th>
<th>Meath</th>
<th>Wicklow</th>
<th>Dublin</th>
<th>Ireland</th>
</tr>
</thead>
<tbody>
<tr>
<td>No. of manufacturing plants 2004</td>
<td>167</td>
<td>179</td>
<td>173</td>
<td>1,249</td>
<td>5,531</td>
</tr>
<tr>
<td>Total employment in mfg. and internationally traded services 2004</td>
<td>15,795</td>
<td>5,573</td>
<td>8,131</td>
<td>80,519</td>
<td>274,995</td>
</tr>
<tr>
<td>Net employment gain 1999-2004 all firms</td>
<td>6,997</td>
<td>3,187</td>
<td>5,341</td>
<td>57,597</td>
<td>151,537</td>
</tr>
<tr>
<td>Net employment gain 1999-2004 Foreign-owned</td>
<td>3,908</td>
<td>446</td>
<td>2,071</td>
<td>30,511</td>
<td>74,080</td>
</tr>
<tr>
<td>Net employment gain 1999-2004 Irish owned</td>
<td>3,089</td>
<td>2,741</td>
<td>3,270</td>
<td>27,086</td>
<td>77,493</td>
</tr>
<tr>
<td>GVA per person employed 2002 (Ireland = 100)</td>
<td>104.4</td>
<td>37.8</td>
<td>66.2</td>
<td>107.8</td>
<td>100.0</td>
</tr>
<tr>
<td>Wages and salaries as % of net output, 2002</td>
<td>11.7</td>
<td>52.5</td>
<td>16.7</td>
<td>12.3</td>
<td>12.7</td>
</tr>
</tbody>
</table>

Source: Forfás database and CSO Census of Industrial Production, 2002

There are 24 foreign owned firms in Kildare employing a total of 10,310 persons on a permanent full-time basis that have been assisted by IDA Ireland. The companies are involved in producing a very diverse range of products including dental equipment, carpets, printers, roofing/cladding and pharmaceuticals. The distribution of foreign owned firms is influenced by many factors including the availability of suitable sites at accessible locations and the likelihood of being able to recruit and maintain a labour force with the requisite range of skills (Map 59).

Further expansion of the foreign owned sector will be influenced by the availability of key infrastructures (transport, telecommunications, environmental and social) and labour forces with appropriate skills at strategic locations in Kildare. Perhaps in the future with the construction of the M9, making the south of the county more accessible, more foreign owned firms will be encouraged to locate in the south. Kildare County Council has an Economic Development Office which aims to increase the county’s share of the wealth created by Ireland’s new economy.
Enterprise Ireland is the principal agency supporting locally controlled manufacturing and internationally traded service industries. It has a government mandate to contribute to driving the growth of regional enterprise. Within the Mid East region its task is to ensure that the towns within the extended commuting distance of Dublin are developed with a good quality of life and a mixed economy so that they will attract new industries to the area. The EI strategy for developing locally controlled enterprises is based on four pillars:

- Developing and sustaining existing businesses,
- Enhancing the environment for business,
- Identifying and encouraging new start-up companies with strong growth potential,
- Identifying new opportunities for economic development, including investments by Dublin based companies who may wish to expand.

The Irish owned manufacturing sector is extensive with approximately 178 plants (December 2004) assisted by Enterprise Ireland, employing a total of 5,784 persons on a permanent full-time basis. There may be others that have not received assistance and are, therefore, not included in the Enterprise Ireland database. The vast majority of plants are classified as small (<50 workers). In 2004 out of the companies that had been categorised, there were 143 in the “small” category and 24 were in the “Medium” (51-250 workers) with just 3 in the “large” category. The distribution of these companies based on size is important as it influences the possibility of achieving economies of scale and also the potential for developing a strong base of internationally competitive enterprises.

The geographical distribution of Enterprise Ireland supported companies is, as expected, more dispersed than the pattern for foreign owned companies (Table 11 and Map 60), although again most are concentrated in the major urban centres. The largest concentration is in Naas with 47 companies, though 34 of these are small ones. Newbridge and Athy both had 17 and there were 7 in Celbridge. The higher densities towards the north-east of the county, particularly around Naas, and along the main transport corridors are noticeable.
Table 1: Distribution of Enterprise Ireland assisted companies, Kildare 2004

<table>
<thead>
<tr>
<th>Town</th>
<th>Size</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Large</td>
<td>Medium</td>
<td>Small</td>
<td>Total</td>
</tr>
<tr>
<td>Naas</td>
<td>2</td>
<td>12</td>
<td>33</td>
<td>46</td>
</tr>
<tr>
<td>Droichead Nua + environs</td>
<td>0</td>
<td>2</td>
<td>16</td>
<td>18</td>
</tr>
<tr>
<td>Celbridge</td>
<td>0</td>
<td>0</td>
<td>7</td>
<td>7</td>
</tr>
<tr>
<td>Leixlip</td>
<td>0</td>
<td>1</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Maynooth</td>
<td>0</td>
<td>0</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>Athy</td>
<td>0</td>
<td>3</td>
<td>14</td>
<td>17</td>
</tr>
<tr>
<td>Kildare</td>
<td>1</td>
<td>0</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td>Clane</td>
<td>0</td>
<td>0</td>
<td>7</td>
<td>7</td>
</tr>
<tr>
<td>Sallins</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Kilcock</td>
<td>0</td>
<td>1</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Monasterevan</td>
<td>0</td>
<td>0</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Kill</td>
<td>0</td>
<td>2</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>Rathangan</td>
<td>0</td>
<td>1</td>
<td>7</td>
<td>8</td>
</tr>
<tr>
<td>Prosperous</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Kilcullen</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Straffan</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Carbury</td>
<td>0</td>
<td>1</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Castledermot</td>
<td>0</td>
<td>0</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Kilmeague</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Robertstown</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>2</td>
</tr>
</tbody>
</table>

Responsibility for fostering and sustaining micro enterprises rests with Kildare County Enterprise Board. Its mission is to "provide a support framework for the promotion and development of micro enterprise in County Kildare which will assist in the creation of competitive and sustainable enterprises on a balanced basis throughout the County." The Board provides a range of services that include:

- Developing an enterprise culture,
- Providing business counselling/advice and mentoring,
- Management training and development,
- Financial assistance.

In accordance with government policy the Enterprise Board has responsibility for the development and support of micro enterprises. Particular aspects of micro enterprise support can be delivered through Kildare LEADER (who already have experience in this area of activity), where appropriate. An important aspect of the projects assisted by local development agencies is that they are generally dispersed away from the main urban centres (Maps 61-66). Thus they have a distinctive role in fostering small-scale rural
based enterprises. However, in the case of projects on the Enhancement of Natural, Built, Social and Cultural Environment and those involving Innovative Rural Enterprises much of the focus does seem to be around some of the urban centres in Kildare and, as such, fostering of similar projects in the more rural and less accessible south and west of the county should be encouraged.

The geographical distribution of industries in the future will be influenced to a large degree by the availability of serviced industrial land. Although key land use zonings have been identified for the main urban areas in Kildare, unfortunately land that has been zoned as industrial, which has been taken up or has live permission on it, cannot be quantified at present in the county. In order to be able to estimate how much development land there is that has not been developed and the location of such land would require a survey to be carried out by the Planning Technicians in Kildare County Council. Perhaps this is a project that could be explored in the future in conjunction with Planning and the GIS Co-ordinator in Kildare County Council. The forthcoming "Economic Profile and Economic Development Strategy for Kildare to 2016" is likely to also be hugely influential on the future path of Kildare’s economic development.
MAP 60: DISTRIBUTION OF COMPANIES ASSISTED BY ENTERPRISE IRELAND

Kildare County Development Board
Rural-Urban Dynamics in Kildare: Socio-economic Patterns and Trends
MAP 61: DISTRIBUTION OF LEADER PLUS FUNDED PROJECTS
ENHANCEMENT OF NATURAL, BUILT, SOCIAL & CULTURAL ENVIRONMENT
MAP 63: DISTRIBUTION OF LEADER PLUS FUNDED PROJECTS
ENVIRONMENTALLY FRIENDLY INITIATIVES

LEADER Plus runs from 2000-2006, this map shows projects to date
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Kildare County Development Board
Rural-Urban Dynamics in Kildare: Socio-economic Patterns and Trends
04

THE ECONOMY

4.3 SERVICES

The services sector accounts for more than two thirds of the total workforce and it is also the most rapidly growing sector. It is, in addition, the sector in which most females are employed. As illustrated in the previous chapter, the distribution of service workers is very much influenced by access to urban centres as most services (retailing, business services, personal services and professional services) are provided from nodal centres. Future demands on this sector will depend on a number of factors such as local demand for locally traded services. For internationally traded services there are different requirements such as the availability of a workforce with appropriate skills plus key infrastructure (especially for ICT based services) and attractive work environments at accessible locations.

In addition to urban-based services tourism is also a major service industry, which can bring significant economic and social benefits to rural villages and small towns. Kildare is famous as a sporting, racing and hunting region. Racing at the Curragh, Punchestown and Naas takes place all year round, boasting some of the biggest meetings in the country's racing calendar. Near Kildare town, the Irish National Stud and neighbouring Japanese Gardens, said by experts to be the best of their kind in Europe, attracting 114,328 visitors in 2005. Other visitor attractions in the county include Ballitore Quaker Museum (1,500 visitors in 2005), Castletown House in Celbridge (10,000 visitors in 2005), Straffan Butterfly Farm, Lullymore Heritage & Discovery Park (over 30,000 visitors in 2004).

Apart from these attractions there are a number of high quality visitor attractions based on the county's archaeological and historical heritage, for example, the designated heritage towns of Kildare and Athy both have heritage centres (Map 67). There are three main tourist routes in Kildare: the North Kildare Tourist Route (including, for example, Castletown House, Leixlip Castle, St. Patrick's College Maynooth, the Millenium Maze and so on); the Mid Kildare Tourist Route (including, for example, The Curragh, The Hill of Allen, the Irish National Stud & Japanese Gardens, and so on); and the South Kildare Tourist Route (including, for example, Punchestown Racecourse, Athy Heritage Centre, Castledermot Abbey, Moone High Cross, Ballitore Quaker Museum and so on (Failte 2005)). Visitors attracted by outdoor pursuits are catered for by equestrian facilities, golf courses and wide variety of walkways. There are also 2 long distance way-marked ways, the Barrow way and the Kildare way, and numerous looped walks and trails (ranging from canal walks to Coillte walks to town walking routes, for example, Sline Sláinte). Despite being a land-locked county, Kildare makes the most of its inland waterways, exploiting the 75 miles of Royal and Grand Canal, the Liffey, the River Rye, and the Barrow for canoeing, cruising, fishing (coarse fishing on the canals and game fishing, particularly on the Rye and the Liffey) and walking alongside. In addition there are 25 annual festivals at a number of locations throughout the county. The latest figures (2004) for the number of overseas tourists (not including domestic figures or day trips to the county) to Kildare are estimated at 161,000 which is second only to Wicklow, with 260,000 when compared to other counties in the Midlands East tourism region, followed by Westmeath with 111,000, Meath 96,000 and Louth 87,000 (Ireland 2004).

Given Kildare’s proximity to Dublin, there is no doubt that there is untapped tourist potential. County Kildare Failte, the county tourism committee has been working to fulfil the recommendations of the Tourism Task Force 2002-2006 but is now at a point where a new set of strategic goals need to be developed for the next five years. While large scale product development and marketing are supported by Failte Ireland and the regional tourism organisation (East Coast and Midlands Regional Tourism Authority) there are also supports for small scale rural tourism initiatives provided by Kildare LEADER especially towards the south of the county (Map 68).

3 Not final figure, figure to early December 2005
MAP 68: DISTRIBUTION OF LEADER PLUS FUNDED PROJECTS RURAL TOURISM

Kildare County Development Board
Rural-Urban Dynamics in Kildare: Socio-economic Patterns and Trends

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