

Major and Agency Supported Employment in the Region

The following sections provide information on the employment data used in the development of the MWASP Planning, Land Use and Transportation Strategy. In particular, it focuses on the major employment areas within the region and assesses these areas in terms of key features and infrastructure, agency supported employment, public sector employment and other employment.

Major Employment Areas

Table 1.1 below highlights the numbers employed in the major employment areas (areas with over 1,500 employees) in the Mid West Region.

There are also a number of other key employment areas in the region that have over 500 employees but less than 1,500 employees. They have been grouped together under ‘*key employment clusters*’ for the purposes of Table .

The last available figures for the numbers employed per area are CSO (POWCAR) 2006 figures. In 2006 there were approximately 160,500 employed in the Region.

The largest employment area in the Mid West Region is Limerick City followed by the Raheen/Dooradoyle area and Shannon.

CSO, PowCAR, 2006

However, based on the QNHS Q3, 2009 (*Principal Economic Statues figures*), employment in the Region was 148,900, a decrease of approximately 7.2%. Therefore, it has been assumed that there has been a 7.2% decrease in employment across areas between 2006 and 2009.

It is important to note that these figures are only indicative, as some areas are likely to have had a higher decrease in employment than others e.g. the Raheen/ Dooradoyle area lost a higher percentage of employees with the reduction in Dell staff.

The table below highlights:

- Limerick City is the largest employment area with 13% (approx. 19,300) of Mid West Region employees;
- The Raheen/Dooradoyle area is the second largest employment area with approximately 8% (approx. 11,830) of Mid West employees; and
- One third of Mid West employees, work within the Limerick/Shannon/Ennis triangle.

Table 1.1: Summary of major employment areas

Key Employment Areas (DEDs)	City/County	Nos. of. Employees		% of Mid West Employees
		2006	Estimated Q3 2009	
Limerick City	Limerick City	20,802	19,300	13.0%
Raheen/Dooradoyle (Ballycummin)	Limerick County	12,757	11,836	7.9%
Castletroy/ Plassey/ Annacotty/ (Ballysimon & Ballyvarra)	Limerick County	6,278	5,825	3.9%
Newcastle West (Newcastle Urban & Rural)	Limerick County	2,443	2,267	1.5%
Shannon (Clenagh & Drumline)	County Clare	11,401	10,578	7.1%
Ennis (Urban 1-4, Rural, Spacehill, Clareabbey, Dorra, Kilnamona)	County Clare	9,687	8,988	6.0%
Nenagh (West Urban, East Urban, Rural)	Tipperary North	4,730	4,388	2.9%
Thurles (Urban & Rural)	Tipperary North	2,864	2,657	1.8%
Rosaria	Tipperary North	1,679	1,558	1.0%
Other employment clusters (ED employment of 500+)	Limerick County	5,134	4,763	3.2%
Other employment clusters (ED employment of 500+)	County Clare	3,426	3,179	2.1%
Other employment clusters (ED employment of 500+)	Tipperary North	999	927	0.6%
People working from home/ no fixed address (whole Mid West Region)	MW Region	28,224	26,186	17.6%
Rest of Mid West Region		50,063	46,449	31.2%
Total		160,487	148,900	100%

Source: CSO, PowCAR, 2006, QNHS, Q3, 2009 & PwC Derived

It should be noted that Limerick North Rural (DED) is included in Limerick City.

Table below identifies these towns/areas under other key employment areas.

Table 1.2: Other Key Employment Areas (500+ employees)

County Limerick	County Clare	North Tipperary
Adare	Killaloe	Templemore
Askeaton	Kilrush	
Aughinish	Scariff	
Kilmallock	Ennistymon	
Limerick South Rural (Rossbrine, Ballysheedy, Rathbane South, Rathkeale)		

Source: CSO, PowCAR, 2006

Each of the areas listed in Table are examined in further detail on the following pages in order to get a clear understanding of the employment breakdown per area.

In estimating the agency supported employment numbers, assumptions had to be made in regard to the number of employees per company. Due to confidentiality reasons, the Agencies (Shannon Development, IDA and Enterprise Ireland) could not disclose the actual number of employees per company.

However, the three agencies use a classification system/employment legend – see Table 1.3 below. Therefore, in calculating the number of employees per company an average indicative figure was used for all the companies, depending on the category the company fell into e.g. if an IDA company was classified in the 0-50 bracket it is assumed the company had 25 employees.

Table 1.3: Agency Classification System

IDA	Enterprise Ireland	Shannon Development
0-50	10-50	0-5
51-200	51 – 250	6-11
301+	250+	11-50
		51-100
		100+

Source: IDA, Enterprise Ireland, Shannon Development

Public sector employment is likely to account for close to 36% of employment.

PwC estimates based on Dept. of Finance, Dept. of Science and Education, HSE Employers Agency and the HEA, 2009 statistics

There are approximately 2,600 (FTEs) agency supported FTEs in Limerick City.

PwC estimates based on IDA, EI, 2009 statistics

Limerick City

It is estimated that there were approximately 19,300 people employed in Limerick City. Agency supported employment accounts for approximately 14% (2,600 FTEs) of total employment, the vast majority of which are supported by Enterprise Ireland across a range of sectors.

It is estimated that public sector employment (including part-time staff) accounts for approximately 7000 or close to 36% of employment in Limerick City.

Key Features/Infrastructure

- **Limerick Dock** contains quays of a total 914 meters with alongside depth that depends on the tides and ranges from .5 meters to 1.2 meters. The berths can accommodate vessels to 152 meters long. The Limerick Docks also contain 5.7 thousand square meters of warehouse space, including 2.8 thousand square meters of new storage for bulk cargoes. The Docks covers 17.8 hectares of land, and the port handles about 550 thousand tons of cargo each year.¹
- **Limerick Dock/Dock Road area** is home to a range of business including J Roche & Sons, APL logistics, Irish Wire Products, Atlas Aluminium, An Post Depot, The Clarion Hotel etc. Coraree Business Park is located on the Dock Road and is home to Advancet Technology Products and Mid Western Lifts.
- **Ballysimon Road area** (Ballysimon Industrial Estate, Crossagalla Industrial Estate, Eastway Business Park, East Link Business Park, Galvone Business Park) is home to a large concentration of businesses in Limerick City.
- **Clondrinagh Industrial Estate** is home to a range of business including Johnson Logistics, Noel Grove Warehouses etc.
- **Limerick Institute of Technology** has approximately 500 staff members (FTEs) and 3,700 full-time students and 1,000 part-time students², the majority of which are pursuing courses in the area of Science, Engineering and IT. The Institute has four main faculties Art and Design, Built Environment, Business and Humanities and Science, Engineering and IT. The Institute had identified the

¹ Source: www.worldportsource.com

² Source: HEA student statistics 2008/2009 and staff numbers at December 2008

following centres as research priorities – Bio sciences (Midwest Bioanalysis Research Centre) and Renewable Energy Control Systems (Envirosense Research Centre).

- **Mary Immaculate College** has approximately 300 staff (FTEs)³ and 3,500 students; it is linked academically to the University of Limerick. The college offers undergraduate and postgraduate degrees in Education, Education and Psychology, the Arts and Early Childhood Care and Education.

Agency supported employment

Table 1.4: Agency supported employment (FTEs) in Limerick City (2009)

	Companies	Employees (FTEs)	Key/Sector/s
IDA	3	100	Range of sectors
Enterprise Ireland	42	2,500	Basic & fabricated metal products, food, wood & wood products and healthcare.
Total	45	2,600	

Source: IDA and Enterprise Ireland databases, 2009, PwC derived

The table above highlights the number of agency supported companies, employees and key sectors in Limerick City. Key findings are:

- There are approximately 2,600 FTEs of which 2,500 are Enterprise Ireland supported employees.
- Manufacturers are the highest percentage of employers.
- Key sectors are basics and fabricated metal products, food, wood & wood products and healthcare.
- Examples of IDA supported companies include Methode Ireland (moulded signal cables), Martin Dawes Systems (IS software) and OMC Scientific Engineering (chemical and engineering cleaning supplies).
- Examples of Enterprise Ireland supported companies include Pennywell Industries Ltd. (stone), Shannon Minerals Ltd. (beverages), Dawn Dairies (food) and Irish Cement Ltd. (construction products/systems).

³ Source: STET

Public sector employment

It is estimated that there are approximately 5,500⁴ public sector FTEs (excluding secondary school teachers, non HEA funded colleges, defence forces, and commercial state sponsored bodies) in Limerick City. Including the excluded groups and part-time employment there is likely to be 6,900 public sector employees. The key public sector employers are:

- **Local authorities** - Limerick City Council.
- **Health sector** - St. Joseph's, St Camillus, St. John's Hospital, Regional Maternity Hospital, Local Health Office and Brothers of Charity.
- **Education** - Limerick Institute of Technology.
- **Civil Service** - Revenue Commissioners and Foreign Affairs.
- **Non-commercial semi state bodies** - Limerick City Enterprise Board.

Other employment (primarily domestic traded services)

Other key employment sectors/employers include:

- A range of non-agency supported companies based on the Dock Road and Ballysimon Road area e.g. Eastway Business Park has a number of logistics companies.
- Retail – the existing primary shopping area covers the northern end of O'Connell Street running into Patrick Street and Cruises Street, Bedford Row and William Street. The main retail outlets are Dunnes, Penneys, Brown Thomas & Debenhams. Parkway shopping centre and Parkway retail park on the Dublin road is another large retail area.
- Accommodation and food service – there are approximately 17⁵ hotels in the City, of which seven are located on the Ennis Road. There are a range of restaurants.
- Professional services - there are a number of financial services and legal firms in the City.

⁴ Source: Department of Finance, HSE Employers Agency, Department of Education & Science and HEA.

⁵ Source: Tourist Accommodation Management Services (TAMS), October 2009

There are approximately 2,500 FTE agency supported FTEs in the Dooradoyle/ Raheen area.

PwC Estimates based on IDA & EI, 2009 estimates

Limerick Regional General Hospital and the Crescent Shopping Centre are the largest employers in the area.

Dooradoyle/Raheen (Ballycummin DED)

It is estimated that there are approximately 12,000 people employed in the Dooradoyle/Raheen area. Agency supported employment accounts for over 20% (2,500 FTEs) of total employment. The vast majority of employment is supported by IDA and is in the computer and electronic & optical equipment sectors.

It is estimated that public sector employment (including part-time staff) accounts for over 3,000 or approximately 25% of employment in the area. Limerick Regional General Hospital and Crescent Shopping Centre are the main employers in the area employing approximately 1,900 and 1,400 people (full and part-time staff) respectively.

Key Features/ Infrastructure

- **Raheen Business Park/ Industrial Estate** encompasses over 440 acres. The Park is home to a number of international companies, and multi-national companies and has a concentration of computers, electronics, food and metal products. The Park provides employment for almost 6,000 people⁶.
- **Crescent Shopping Centre** has 37,000sqm of retail space with approximately 94 units. Other facilities include restaurants, a 12 screen cinema, a free standing McDonalds, banks, a crèche and 2,500 free parking spaces in surface and basement car parks. The complex also includes the offices of Limerick County Council, and a public library. The centre has a number of main anchor tenants, namely Tesco, Penneys, Shaws, Heatons, Argos and Boots.

Agency supported employment

Table 1.5: Agency supported employment (FTEs) in Limerick City (2009)

	Companies	Employees (FTEs)	Key/Sector/s
IDA	9	2,200	Computer, electronic & optical equipment and healthcare.
Enterprise Ireland	10	300	Computer, electronic & optical equipment and food.
Total	19	2,500	

⁶ Source: Shannon Development, An Economic Overview of the Shannon Region, May 2009

Source: IDA and Enterprise Ireland databases, 2009, PwC derived

Table 1.5 above highlights the number of agency supported companies, employees and key sectors in the Dooradoyle/Raheen area. Key findings are:

- There are approximately 2,500 FTEs of which 2,200 are IDA supported employees.
- Manufacturers are the highest percentage of employers, followed by professional, scientific and technical employers.
- Key sectors are computer, electronic & optical equipment, healthcare and food.
- Examples of IDA supported companies include Dell Products (personal computers and shared services), Analog Devices BV (integrated circuit design and shared services) Stryker Howmedica Osteonics (orthopaedic implants) and Banta (logistics).
- Examples of Enterprise Ireland supported companies include Sercom Solutions Ltd. (business process services), Litho circuits Ltd. (electronic components) and M&M Walshe Ltd. (pig meat)

Public Sector Employment

It is estimated that there are approximately 2,400⁷ public sector FTEs (excluding secondary school teachers, non HEA funded colleges, defence forces, and commercial state sponsored bodies) in the Dooradoyle/Raheen area. Including the excluded groups and part-time employment there is likely to be close to 3,000 public sector employees. The key public sector employers are:

- **Local authorities** - Limerick County Council. There are approximately 400 FTEs including managerial, administration, technical and NDP project staff employees. Outdoor employees have not been included.
- **Health sector** - Limerick Regional Hospital.
- **Non-commercial semi state bodies** - Limerick County Enterprise Board.

⁷ Source: Department of Finance, HSE Employers Agency, Department of Education & Science

Other employment (primarily domestic traded services)

Other key employment sectors/employers include:

- A number of non-agency supported companies are based at the Raheen Industrial Estate.
- Retail – the Crescent Shopping Centre is a major retail destination in the Region and a key employer in the area. It employs approximately 700 full-time and 700 part-time staff.
- Accommodation and food service - there is one hotel in Raheen, the South Court Hotel.
- Construction – there are a number of builder contractors based in Raheen.

Castletroy/Plassey/Annacotty (Ballysimon and Ballyvarra DED)

Agency supported employment accounts for approximately 50% of employment in the Castletroy, Plassey/Annacotty area.

PwC Estimates based on IDA, EI, 2009

University Limerick has approximately 1,300 FTEs

HEA Statistics 2008/2009

NTC has approximately 3,000 employees.

Shannon Development website

It is estimated that there are approximately 6,000 people employed in the Castletroy/Plassey/Annacotty area. Agency supported employment accounts for over 50% (3,000 FTEs) of total employment, primarily employed in the National Technology Park NTC and Annacotty Industrial Estate. The key sectors in the area are ICT – software and consulting, computer, electronic & optical equipment and healthcare.

It is estimated that public sector employment (including part-time staff) accounts for over 2,100 jobs or close to 35% of jobs in the area. University of Limerick is the key public sector employer, employing 1,300 FTEs.

Key Features/ Infrastructure

- **University of Limerick** has approximately 1,300 Staff (FTEs) and 9,350 full-time students and 1,160 part-time students⁸. The college has four faculties: Arts, Humanities and Social Sciences; Business; Education and Health Sciences; Science and Engineering. The University has a number of internationally recognised research institutes including: the Material and Surface Science Institute, the Stokes Research Institute (Biofluids and Micromechanical Engineering), the Lero Irish Software Engineering Institute and the Institute for Knowledge in the Society. There are also a number of research centres covering areas such as telecommunications and networks with an emphasis on thermal management and energy efficiency issues.
- **National Technology Park (NTC)** was established next to the University of Limerick in 1984 as Ireland's first science and technology park. The park is owned by Shannon Development and is part of an 800 acre campus. It is home to a cluster of high-technology and knowledge-based companies. The park had over 80 organisations employing 3,000⁹ people; the Park has a balanced mix of multinational subsidiaries, Irish technology companies, R&D entities and support services. Key sectors are ICT, healthcare and e-business.

⁸ Source: HEA Statistics 2008/2009 and staff numbers at December 2008

⁹ Source: Shannon Development website.

- **Annacotty Industrial Estate** is home to a concentration of companies including transport, logistics, construction and ICT companies.

Agency supported employment

Table 1.6: Agency supported employment (FTEs) in the Castletroy/ Plassey/ Annacotty area (2009)

	Companies	Employees (FTEs)	Key/Sector/s
IDA	20	1,800	ICT – software and computer, electronic & optical equipment and healthcare.
Enterprise Ireland	17	1,200	ICT-software, computer consulting, healthcare and basic & fabricated metal products
Total	37	3,000	

Source: IDA and Enterprise Ireland databases, 2009

Table 1.6 above highlights the number of agency supported companies, employees and key sectors in the Castletroy/ Plassey/ Annacotty area.

- There are approximately 3,000 FTEs of which 1,800 are IDA supported employees.
- Approximately 2,300 agency supports employees are based in the NTC.
- Key sectors in the NTC are ICT – software and consultancy and healthcare.
- Examples of IDA supported companies include Cook Ireland Ltd. (endoscopic products), Vistakon – a division of Johnson & Johnson (disposable contact lenses), Northern Trust (fund administration), Broadword Technology Ltd. (IT consultancy services) and Teleflex Medical Eng. Ltd. (extruded medical tubing/fittings).
- Examples of Enterprise Ireland supported companies include Feasa Enterprise Ltd. (photonics), Broadword Technology Ltd. (consultancy services), Advanced Innovations Ltd. (innovation support and supply chain services), Annio (online reservation technology), IC Mask Design Ltd. (design services), and Shortt Stainless Steel (general engineering).

University Limerick is the main public sector employer in the area.

Public sector employment

It is estimated that there are approximately 1,700¹⁰ public sector FTEs (excluding secondary school teachers, non HEA funded colleges, defence forces, and commercial state sponsored bodies) in the Castletroy/Plassey/Annacotty area. Including the excluded groups and part-time employment there is likely to be close to 2,100 public sector employees. The key public sector employers are:

- **Health sector** – North Tipperary Health Office is based at the NTC.
- **Education** - University of Limerick.

Other employment (primarily domestic traded services)

Other key employment sectors/employers include:

- A range of non-agency supported companies based at the NTC and Annacotty Industrial Estate.
- Accommodation and food service - there are two hotels in Castletroy the Kilmurry Lodge Hotel and Carlton Castletroy Park Hotel¹¹.

¹⁰ Source: Department of Finance, HSE Employers Agency, Department of Education & Science

¹¹ Source: TAMS, October 2009

Agency supported employment accounts for close to 13% of employment in the area.

PwC Estimates based on IDA & EI, 2009 estimates

Newcastle West

It is estimated that there are close to 2,300 people employed in the Newcastle West area. Agency supported employment accounts for close to 13% (280 FTEs) of total employment, primarily supported by the IDA. The key sectors in the area are healthcare, food and machinery & equipment.

It is estimated that public sector employment (including part-time staff) accounts for approximately 340 jobs or 15% of jobs in the area.

Agency supported employment

Table 1.7: Agency supported employment (FTEs) in Newcastle West area (2009)

	Companies	Employees (FTEs)	Key/Sector/s
IDA	2	200	Machinery & equipment and healthcare.
Enterprise Ireland	4	80	Machinery & equipment and healthcare and food.
Total	6	280	

Source: Source: IDA and Enterprise Ireland databases, 2009

Table 1.7 above highlights the number of agency supported companies, employees and key sectors in the Newcastle West area. Key findings are:

- There are approximately 280 FTEs of which 200 are IDA supported employees.
- Key sectors are healthcare, food and machinery and equipment.
- Examples of IDA supported companies include Filterek BV (medical filters) and Myson Heating Controls Ltd. (radiator valves).
- Examples of Enterprise Ireland supported companies include Richard Nash & Co (beverages), Ashgrove Wholesale Ltd. (beef), Pat Smyth Engineering Ltd. (power systems) and Nolan Products Ltd. (wood products).

The HSE is the biggest public sector employer in the Newcastle west area.

PwC estimates based HSE
Employers Agency, 2009
statistics

Public sector employment

It is estimated that there is approximately 270¹² public sector FTEs (excluding secondary school teachers, non HEA funded colleges, defence forces, and commercial state sponsored bodies) in Newcastle West. Including the excluded groups and part-time employment there is likely to be close to 320 public sector employees. The key public sector employers are:

- **Health sector** – St. Ita’s Home.
- **Civil Service** – Revenue Commissioners, Social and Family Affairs and Limerick County Council Area Office.

Other employment (primarily domestic traded services)

Other key employment sectors/employers include:

- Other large to medium employers in the town include Pallas Foods and Ballygowan Spring Water.
- Retail is a key employer in the town. Whilst there are two SuperValue supermarkets the town centre is primarily devoted to the sale of comparison goods¹³.
- A number of e-business companies have been set up including HuntOffice.ie and IrishTourism.com.

¹² Source: Department of Finance, HSE Employers Agency, Department of Education & Science

¹³ Source: Colliers CRE, Retail Strategy for the Mid West Region, 2008-2010, 2009

Agency supported employment accounts for approximately 65% of employment in the area.

PwC estimates based on Shannon Development & EI statistics, 2009 statistics

Shannon Free Zone is home to over 100 companies.

Shannon (Clenagh & Drumline DEDs)

It is estimated that there is close to 10,600 people employed in the Shannon area. Agency supported employment accounts for 65% (6,800 FTEs) of total employment. The majority of agency supported jobs are located in the Shannon Free Zone and supported by Shannon Development. Key sectors in the Free Zone include Aerospace, ICT hardware and software, engineering & electronics, financial and international services.

It is estimated that public sector employment (including part-time staff) accounts for approximately 600 jobs or 6% of jobs in the area.

Key Features/Infrastructure

- **Shannon Airport** – is part of Dublin Airport Authority plc (DAA). The airport currently hosts air services to/from 35 locations in Ireland the UK and USA. From the summer of 2009, Shannon was first airport in Europe to offer full preclearance facilities to US bound passengers. The Airport employed c. 300 FTEs in 2009.
- **Shannon Free Zone - covers 240 hectares (600 acres)** adjacent to Shannon International Airport, and is home to 101 companies. The official Shannon Development employment figures for 2009 have not been released yet, however it is estimated that the number of employees in the Shannon Zone were approximately 6,400. These companies generate exports in excess of €3.3 billion per annum¹⁴. The Zone is managed and promoted by Shannon Development and represents Ireland largest cluster of North American investments. Internationally traded services accounts for more than 60% of enterprises and 40% of employment.
- **WestPark Business Park** – is a 40 acre site in the Shannon Free Zone. The park provides high-spec amenities to High-Tech business. The park has a cluster of aviation companies, including GECAS, SES, Aldus & Parc Aviation, and AerCap it is also home to Enterprise Ireland National Regional Headquarters and Schwarz Pharma.
- **Smithstown Industrial Estate.** Smithstown Industrial Estate accommodates more than 30 small indigenous companies in the manufacturing and service sectors. In 1977 Shannon Development identified Smithstown as a location for Town Services for the Town of Shannon. With

¹⁴ Source: www.shannondevelopment.com

the advent of the Indigenous Industry Programme piloted by Shannon Development in the early 1980's Smithstown quickly developed as a centre for small indigenous industry and home to a number of companies serving Shannon Free Zone. A high percentage of businesses located in the park are transport/logistic companies.

- **East Park Industrial Estate** is home to both domestic and foreign companies for example Irish Express Logistics.

Agency supported employment

There are approximately 6,800 agency supported FTEs in Shannon.

PwC estimated based on Shannon Development & EI, 2009 statistics

Table 1.8: Agency supported employment (FTEs) in Shannon (2009)

	Companies	Employees (FTEs)	Key/Sector/s
Shannon Development	101	6,400	Aerospace, ICT hardware and software, engineering & electronics, financial and international services, pharmaceuticals and healthcare.
Enterprise Ireland	16	420	Machinery & equipment and basic & fabricated metal products.
Total	117	6,820	

Source: Shannon Development and Enterprise Ireland databases, 2009

Table 1.8 above highlights the number of agency supported companies, employees and key sectors in the Shannon area. Key finding are:

- There are approximately 6,820 FTEs of which 6,400 are Shannon Development supported employees.
- Key sectors in the Shannon Free Zone are aerospace, engineering & electronics, ICT, financial and international services, pharmaceutical and healthcare.
- Approximately 45% of the companies in the Shannon free Zone are manufacturing companies.
- Key sectors in Smithstown Industrial Estate are machinery and equipment and basic and fabricated metal products.
- Examples of Shannon Development supported companies include:
 - Aerospace (Aer Atlanta, Lufthansa Technik Turbine, Shannon Aerospace).
 - Engineering & electronics (Element Six, Molex, Tekelek Europe).
 - ICT (Beta Layout, Intel, Mentor Graphics, Tecnomen, RSA Security).

- Financial services (GE Commercial Finance Aviation Services Ltd, GE Money, Aon Insurance, Halifax Insurance).
- International services including headquarters, customer support, logistics and transport (Bax Global, DJL express, Fedex, UPS).
- Pharmaceuticals and healthcare (Schwarz Pharma, Reagecon Group, Zimmer Orthopedics Manufacturing).
- Examples of Enterprise Ireland supported companies include Mincon International Ltd. (precision engineering), Fabricated Products (Shannon) Ltd. (precision engineering), Chemifloc Ltd. (pharma bio).

Public sector employment

It is estimated that there are approximately 500¹⁵ public sector FTEs (excluding secondary school teachers, non HEA funded colleges, defence forces, and commercial state sponsored bodies) in Shannon. Including the excluded groups and part-time employment there is likely to be over 600 public sector employees. The key public sector employers are:

- **Health sector** – Brothers of Charity.
- **Education** – Shannon College of Hotel Management and there are a number of primary schools in the town.
- **Civil Service** – Transport, Shannon Airport and the Revenue Commissioners.
- **Non-commercial semi state bodies** – Shannon Development including industrial and tourism and FÁS.

Other employment (primarily domestic traded services)

Other key employment sectors/employers include:

- There are approximately 300¹⁶ FTEs employed at Shannon Airport. Approximately 27 of these are civil servants and are included in the public sector figures above.
- Accommodation and food service - there are three hotels in Shannon: Shannon Court Hotel, Park Inn Shannon Airport and Oakwood Arms Hotel.¹⁷

There are approximately 500 public sector FTEs in Shannon. Shannon Development is the main public sector employer in the area.

PwC estimates based on Dept. of Finance, Dept. of Science and Education, HSE Employers Agency and the HEA, 2009 statistics

¹⁵ Source: Department of Finance, HSE Employers Agency, Department of Education & Science, Shannon College of Hotel Management website

¹⁶ Source: Dublin Airport Authority, 2009 FTEs

¹⁷ Source: TAMS, October 2009.

- Retail – the main shopping centre is at Shannon Skycourt, The centre has been redeveloped and extended in recent years, however the number of shops has reduced over the years¹⁸.

¹⁸ Source: Colliers, Retail Strategy for the Mid West Region, 2009

There are approximately 1,500 agency supported FTEs in Ennis.

PwC estimates based on IDA & EI, 2009 statistics

Ennis

It is estimated that there are approximately 9,000 people employed in the Ennis area. Agency supported employment accounts for close to 17% (c. 1,500 FTEs). The key sectors in the area are computer & electronic equipment and pharmaceuticals.

It is estimated that public sector employment (including part-time staff) accounts for over 32% (2,900) of jobs in the area.

Key Features/ Infrastructure

- **Information Age Park** was formally opened in 2005. Shannon Development's office space at the Information Age Park Ennis currently accommodates 16 client companies. Key sectors include software and ICT, international services, back office support and publishing.
- **Gort Road Business Park** is on the main Ennis-Galway M18 Route. The park has a mix of retail and commercial occupiers.
- **Clonroad Business Park** is located on the main Ennis-Galway M18 route. It is home to a range of SME including: JMC Retail Systems, Continental Furniture, and Enable Ireland.

Agency supported employment

Table 1.9: Agency supported employment (FTEs) in the Ennis area

	Companies	Employees (FTEs)	Key/Sector/s
IDA	7	1400	Computer & electronic equipment and pharmaceuticals.
Enterprise Ireland	6	120	Range of sectors
Total	13	1,520	

(2009)

Source: IDA and Enterprise Ireland databases, 2009

Table 1.9 above highlights the number of agency supported companies, employees and key sectors in Ennis. Key finding are:

- There are approximately 1,520 FTEs of which 1,400 are IDA supported employees.
- Six of the seven IDA supported companies are Manufacturers.

The HSE and Clare County Council are the main public sector employers in the area.

PwC Estimated based on Dept. of Finance, Dept. of Science and Education, HSE Employers Agency and the HEA, 2009 statistics

- Key sectors are ICT and pharmaceuticals.
- Examples of IDA companies include Roche Ireland (pharmaceuticals) Bijur Lubricating Ireland Ltd. (lubricating systems for machines) and Essidev SA (lenses).
- Examples of Enterprise Ireland companies include Vitalograph Ireland Ltd. (medical devices), O'Connor's confectionary Ltd. (food) and Broker CRM Ltd. (financial and business process services).

Public sector employment

It is estimated that there is approximately 2,300¹⁹ public sector employees FTEs (excluding secondary school teachers, non HEA funded colleges, defence forces, and commercial state sponsored bodies) in Ennis. Including the excluded groups and part-time employment there is likely to be close to 2,900 public sector employees. The key public sector employers are:

- **Local authorities** – Clare County Council, including managerial, administration and technical employees. Outdoor employees have not been included.
- **Health sector** – Ennis General Hospital, Our Lady's Hospital, St. Joseph's Hospital and the Local Health Office.
- **Civil service** – Revenue Commissioners, Agriculture & Food and Social and Family Affairs.
- **Non-commercial semi state bodies** – Clare County Enterprise Board and Teagasc.

Other employment (primarily domestic traded services)

Other key employment sectors/employers include:

- A range of non-agency supported companies based at the various business parks around Ennis.
- Retail – is a key employer. The town has a strong convenience offer and reasonable range of stores including Dunnes, Penney's, a number of 'high street' multiples and many independent stores²⁰.
- Accommodation and food service – there are seven hotels: Ashford Court Boutique Hotel, Auburn Lodge Hotel and Leisure Centre, Magowna House Hotel, Temple Gate Hotel, Queens Hotel & nightclub, Old Ground Hotel and West

¹⁹ Source: Department of Finance, HSE Employers Agency and Department of Education & Science

²⁰ Source: Colliers, Retail Strategy for the Mid West Region.

County Hotel and Leisure Centre²¹ and a range of restaurants.

²¹ Source: TAMS, October 2009.

There are approximately 700 agency supported FTEs in Nenagh.

PwC estimates based on IDA & EI, 2009 statistics

Nenagh

Snapshot of Employment Make-up in the Area

It is estimated that there are approximately 4,400 employed in the Nenagh area. Agency supported employment accounts for close to 16% (c. 700 FTEs) of total employment, the majority of which are supported by the Enterprise Ireland. The key sectors in the area are food, machinery & equipment & pharmaceuticals.

It is estimated that public sector employment (including part-time staff) accounts for approximately 32% (1,400) of jobs in the area.

Agency supported employment

Table 1.10: Agency supported employment (FTEs) in Nenagh (2009)

	Companies	Employees (FTEs)	Key/Sector/s
IDA	1	300	Pharmaceuticals
Enterprise Ireland	11	400	Food and machinery & equipment.
Total	12	700	

Source: IDA and Enterprise Ireland databases, 2009

Table 1.10 above highlights the number of agency supported companies, employees and key sectors in Nenagh. Key findings are:

- There are approximately 700 FTEs of which 400 are Enterprise Ireland supported employees.
- 10 of 12 agency supported companies are manufacturers.
- Key sectors are pharmaceuticals, food and machinery & equipment.
- Proctor & Gamble (cosmetics) is the only IDA supported company in the town.
- Examples of Enterprise Ireland companies include Anglo Irish Beef Packers (beef), Abbey Farm Equipment Ltd. (agricultural machinery) and the Nenagh Guardian Ltd.

Public Sector employment

It is estimated that there are approximately 1,100²² public sector FTEs (excluding secondary school teachers, non HEA funded colleges,

²² Source: Department of Finance, HSE Employers Agency and Department of Education & Science

There are approximately 1,100 public sector FTEs in Nenagh. The Revenue Commissioners are the largest public sector employer.

PwC estimates based on Dept. of Finance, Dept. of Science and Education, HSE Employers Agency and the HEA, 2009 statistics

defence forces, and commercial state sponsored bodies) in Nenagh. Including the excluded groups and part-time employment there is likely to approximately 1,400 public sector employees. The key public sector employers are:

- **Local authorities** – Tipperary Town Council, including managerial, administration and technical employees. Outdoor employees have not been included.
- **Health sector** – Nenagh General Hospital and St. Colon's Community Nursing.
- **Civil Service** – Revenue Commissioners and Justice, Quality and Law Reform.
- **Non-commercial semi state bodies** – Teagasc.

Other employment (primarily domestic traded services)

Other key employment sectors/employers include:

- Retail – is a key employer.
- Accommodation and food service - Nenagh has two hotels: the Abbey Court Hotel and Lodges and the Ormond Hotel²³ and a range of restaurants.

²³ Source: TAMS, October 2009.

Thurles

There are approximately 430 agency supported FTEs in Thurles.

PwC estimates based on IDA & EI, 2009 statistics

Snapshot of Employment Make-up in the Area

It is estimated that there are approximately 2,700 people employed in the Thurles area. Agency supported employment accounts for close to 16% (c. 430 FTEs) of total employment, all of which are supported by the Enterprise Ireland. The key sector in the area is food.

It is estimated that public sector employment (including part-time staff) is likely to account for close to 30% (c. 800) of jobs in the area.

A number of large companies make-up a large percentage of the other employment, for example Lisheen Mines employs approximately 37024 people (approximately 14% of total employment).

Key Features/Infrastructure

- **Tipperary Technology Park** was developed by Shannon Development. The park offers business incubation centre (InnovationWorks), office space and services sites. The two buildings on campus comprise 25,000 sq ft in total. There are currently 11 companies operating from the site and a total of 140 employed. The most recent companies that have been set up in the Technology Park are Digital Cinema, providing a countrywide digital movie and advertising distribution network; and Intercall, a 24/7 call centre.
- **Tipperary Institute of Technology.** The college has three departments including business, information and technology and rural development. The Institute has a special remit in promoting sustainable rural development.
- **St Patrick's College** is a college of education, primarily specializing at undergraduate level in preparing students to teach in post-primary schools.

Public sector employment is likely to account for over 30% of employment in the area.

PwC estimated Dept. of Finance, Dept. of Science and Education, HSE Employers Agency and the HEA, & PwC estimates, 2009 statistics

²⁴ Source: www.lisheemine.ie.

Agency supported employment

Table 1.11: Agency supported employment (FTEs) in Thurles (2009)

	Companies	Employees (FTEs)	Key/Sector/s
IDA	0	0	NA
Enterprise Ireland	7	430	Food
Total	7	430	

Source: Enterprise Ireland database, 2009

The table above highlights the number of agency supported companies, employees and key sectors in Thurles. Key findings are:

- There are no IDA supported companies.
- There are approximately 430 FTEs Enterprise Ireland supported employees.
- The key sector is food.
- Examples of Enterprise Ireland supported companies include Centenary Co-Op Creamery Society Ltd. (dairy), The Tipperary Cheese Co Ltd. (dairy) and Dew Valley Meats (pigmeat), Sable Outwear Manufacturing Ltd. (textiles).

Public Sector employment

It is estimated that there are approximately 640²⁵ public sector FTEs (excluding secondary school teachers, non HEA funded colleges, defence forces, and commercial state sponsored bodies) in the Thurles area. Including the excluded groups and part-time employment there is likely to be approximately 800 public sector employees. The key public sector employers are:

- **Health sector** – Thurles Hospital of Assumption.
- **Education** – Tipperary Institute of Technology and there are a large number of primary schools in the area.
- **Civil service** – Garda Civilian including the Garda Central Vetting Unit and the Revenue Commissioners

Other employment (primarily domestic traded services)

Other key employment sectors/employers include:

²⁵ Source: Department of Finance, HSE Employers Agency and Department of Education & Science

Tipperary Institute of Technology, Thurles Hospital of the Assumption and the Gárdai are the main public sector employers in the area.

PwC Estimates base on Dept. of Finance, Dept. of Science and Education, HSE Employers Agency and the HEA, 2009 statistics

- Engineering, logistics and natural resources sectors provide employment. Examples of a non agency funded medium to large companies are Lisheen Mines which is the largest zinc mine in Europe, Liam Carroll Group, a logistics company and Clancy Construction.
- The retail sector is a key employer in Thurles. There are a number of retail parks including Thurles Shopping Centre – the anchor tenant is Dunnes Stores, the Race Course Retail Park – occupiers include EX Living, Cleary’s Toys and the Thurles Retail Park occupiers include Hanafins Furniture, Kevin Darmody Plumbing/Heating etc.
- Accommodation and food services - there are four hotels in Thurles including: Munster Hotel, Hayes Hotel, Anner Hotel and the Horse and Jockey Hotel²⁶.

²⁶ Source: TAMS, October 2009.

There are approximately 230 agency supported FTEs in Roscrea.

PwC estimates based on IDA & EI, 2009 statistics

Roscrea

Snapshot of Employment Make-up in the Area

It is estimated that there are approximately 1,600 people employed in the Roscrea area. Agency supported employment accounts for close to 15% (c. 230 FTEs) of total employment, all of which are supported by the Enterprise Ireland. The key sector in the area is food.

It is estimated that public sector employment (including part-time staff) is likely to account for approximately 31% (c. 500) of jobs in the area.

Key Features/ Infrastructure

- **Roscrea Business and Technology Park** is a Shannon Development owned park. It is approximately 26 acres and has 225,000 sq ft of manufacturing service and office space. The park is home to Walsh Printers and JS Hygiene (upholstery cleaning).
- **Benamore Business Park** is on the Dublin Road. Companies located here include Roscrea Express Delivery Services, Minogue Furniture, Looby Tiles etc.

Agency supported employment

Table 1.12: Agency supported employment (FTEs) in Roscrea (2009)

	Companies	Employees (FTEs)	Key/Sector/s
IDA	1	30	Pharmaceuticals
Enterprise Ireland	5	200	Food
Total	4	230	

Source: IDA and Enterprise Ireland database, 2009

Table 1.12 above highlights the number of agency supported companies, employees and key sectors in Roscrea. Key finding are:

- There are approximately 230 FTEs of which 200 are Enterprise Ireland supported employees.
- The key sectors are food and pharmaceuticals.
- The IDA supported company is Taro Pharmaceuticals.
- Examples of Enterprise Ireland supported companies include Rosderra Meats (formerly Glanbia Meats) (pigmeat), Ashbourne Meat Processors (beef), Skippy International Ltd. (textiles).
- Rosderra Meats is the largest employer in the town.

Public sector employment is likely to account for over 32% of employment in the area.

PwC estimated Dept. of Finance, Dept. of Science and Education, HSE Employers Agency and the HEA, & PwC estimates, 2009 statistics

Public Sector employment

It is estimated that there are approximately 400²⁷ public sector FTEs (excluding secondary school teachers, non HEA funded colleges, defence forces, and commercial state sponsored bodies) in Roscrea. Including the excluded groups and part-time employment there is likely to approximately 500 public sector employees. The key public sector employers are:

- **Health sector** – Daughters of Charity and Dean Maxwell Community Nursing.
- **Education** – there are a number of primary schools in the area.
- **Civil service** – Civil Defence and Equality.

Other employment (primarily domestic traded services)

Other key employment sectors/employers include:

- Retail Sector - there are numerous supermarkets including Tesco, SuperValu, Lidl, Dunnes Stores etc.
- Accommodation and food services – there are two hotels: the Damer Court hotel and Racket Hall hotel²⁸.

²⁷ Source: Department of Finance, HSE Employers Agency, Department of Education & Science, Shannon College of Hotel Management website

²⁸ Source: TAMS, October 2009.

Agency supported employment and public sector employment as a percentage of total employment is low when compared with the major employment areas in the Region.

The Rest of the Mid West Region

Snapshot of Employment Make-up in the Area

It is estimated that there is over 55,000 employed in the Rest of the Mid West Region. This area includes the key employment areas with between 500 – 1,500 people working, namely:

- Adare, County Limerick
- Askeaton, County Limerick
- Auginish, County Limerick
- Kilmallock, County Limerick
- Limerick South Rural, County Limerick
- Ennistymon, County Clare
- Killaloe, County Clare
- Kilrush, County Clare
- Scariff, County Clare
- Templemore, North Tipperary

It is estimated that agency supported employment accounts for over 10% (c. 5,300 FTEs) of total employment. There are a wide range of sectors supported by the IDA and Enterprise Ireland.

Public sector employment (including part-time staff) is likely to account for over 7% (c. 3,800) of jobs in the area. Public sector employment and agency supported employment as a percentage of total employment is very low when compared with the major employment areas throughout the Region.

Both public sector and agency supported employment tend to be in urban areas.

Agriculture, forestry and fishing accounts for over 20% of employment in the rest of the Mid West Region.

Key Features/ Infrastructure

- **Shannon Foynes Port** is the main port in the Region. It a deepwater facility catering for all key cargo classifications and with a substantial land bank and large storage facilities.
- **Other port terminals** include Shannon Airport is an aviation fuels terminal, Moneypoint has a modern coal transshipment facility, Tarbert Island is used for heavy fuel and Auginish catering for bauxite and alumina imports and exports.

There are approximately 5,300 agency supported FTEs in the rest of the Mid West Region.

PwC estimated based on IDA & EI, 2009 Statistics

There are approximately 3,100 public sector FTEs in the rest of the Region. The HSE and the education sector are the main public sector employers in the rest of the Region.

PwC estimates based on Dept. of Finance, Dept. of Science and Education, HSE Employers Agency and the HEA, 2009 statistics

Public sector employment is likely to account for over 7% of employment in the area.

PwC estimates based on Dept. of Finance, Dept. of Science and Education, HSE Employers Agency and the HEA, & PwC estimates, 2009 statistics

Agency supported employment

Table 1.13: Agency supported employment (FTEs) in the Rest of the Mid West Region (2009)

	Companies	Employees (FTEs)	Key/Sector/s
IDA	9	1,800	Range of sectors
Enterprise Ireland	68	3,500	Food, wood & wood products, rubber & plastics and machinery & equipment
Total	77	5,300	

Source: IDA and Enterprise Ireland databases, 2009

Table 1.13 above highlights the number of agency supported companies, employees and key sectors in the Rest of the Mid West Regions (all areas outside the major employment areas). Key findings are:

- There are approximately 5,300 FTEs of which 3,500 are Enterprise Ireland supported employees.
- Key sectors are food, wood & wood products, rubber and plastics, machinery & equipment.
- Examples of the larger IDA supported companies include Anderson Ireland (costume jewellery) Rathkeale, Co. Limerick, Aughinish Alumina Ltd. (alumina), Askeaton, Co Limerick, Kostal Ireland (automatic components), Abbeyfeale, Co. Limerick and Beckman Coulter Biomedical (diagnostics kits), Lismeehan, Co Clare.
- Examples of the larger Enterprise Ireland supported companies include Tipperary Glass Ltd (mechanical engineering), Templemore (non-metallic manufacturing), Foynes Engineering, Co Limerick, Greaney Concrete Products Ltd. (construction products/systems), Shannagolden, Co Limerick and The Benson Box Co (IRL) Ltd. (packaging), Killaloe, County Clare.

Public sector employment

It is estimated that there are approximately 3,100 public sector employees (excluding secondary school teachers, non HEA funded colleges, defence forces, and commercial state sponsored bodies) in the rest of the Mid West Region. Including the excluded groups and part-time employment there is likely to approximately 3,800 public sector employees. The key public sector employees are:

- **Health** – Daughters of Charity, Lisnagary, Co Limerick, Regional Orthopedic, Croom, County Limerick, Regina House, Kilrush, Clare etc.
- **Education** – there are a large number of primary schools in the Region.
- **Civil servants** – there are a number of Garda Síochána stations in the Region, the Garda Síochána Training College is in Templemore, Revenue Commissioners in Kilrush,
- **Non Commercial semi state bodies** – Teagasc has offices throughout the Region.

Other employment (primarily domestic traded services)

Other key employment sectors/employers include:

- Agriculture, forestry and fishing - approximately 10,400 living in the Region are employed in agriculture, forestry and fishing in the Region²⁹. It is assumed that a high percentage of those employed in the sector reside and work in the Region.
- Accommodation and food services – there are over 50 hotels located in the Region (outside of the main employment areas). There is a concentration of hotels in Clare, along the west coast, for example Lisdoonvarna has nine hotels, Lahinch and Kilkee both have five³⁰.
- Energy sector – Moneypoint is one of Ireland's largest electricity generation stations. The facility is located on the Shannon Estuary 5km east of Kilrush, Clare. It was constructed at a cost of more than €700m, in one of the largest capital projects in the history of the Irish State. It is currently undergoing an environmental retrofit and systems upgrade at a cost of over €365m. There are also a number of wind farms in the Region with a cluster in North Tipperary including companies such as North Tipperary Wind Power Ltd, Jaroma Windfarm Limited.

²⁹ Source: CSO, QNHS, ILO Status, Q3 2009

³⁰ Source: TAMS, October 2009.

Summary of Major Employment Areas

Shannon has the highest number of agency supported employees.

PwC estimated based on EI & Shannon Development, 2009 statistics

Based on data gathered from Department of Finance, Department of Science and Education, HSE employers Agency, IDA, Enterprise Ireland and Shannon Development, an estimate of the number of public sector and agency supported jobs in each of the major employment areas was estimated.

Figure 1.1: Breakdown of employment per area (2009)

Key Employment Areas (DEds)	Total Employees (Est. 2009)	Agency Supported Employment		Public Sector Employment				Other Employment
	Total Headcount	FTEs	% of total	FTEs	% of total	Est. Total Headcount	% of total	% of total
Limerick City	19,300	2,600	13%	5,600	29%	7,000	36%	50%
Raheen/Dooradoyle (Ballycummin)	11,836	2,500	21%	2,400	20%	3,000	25%	54%
Castletroy/ Plassey/ Annacotty/ (Ballysimon & Ballyvarra)	5,825	3,000	52%	1,700	29%	2,125	36%	12%
New castle West (New castle Urban & Rural)	2,267	280	12%	270	12%	338	15%	73%
Shannon (Clenagh & Drumline)	10,578	6,820	64%	500	5%	625	6%	30%
Ennis (Urban 1-4, Rural, Spacehill, Clareabbey, Dorra, Kilnamona)	8,988	1,520	17%	2,300	26%	2,875	32%	51%
Nenagh (West Urban, East Urban, Rural)	4,388	700	16%	1,100	25%	1,375	31%	53%
Thurles (Urban & Rural)	2,657	430	16%	640	24%	800	30%	54%
Roscrea	1,558	230	15%	400	26%	500	32%	53%
Rest of the Mid West Region (incl. other key employment clusters)	55,317	5,300	10%	3,070	6%	3,838	7%	83%
People working from home/ no fixed address (w hole Mid West Region)	26,186							
Total	148,900	23,380		17,980		22,475		

DoF, DoS&E and HSE Employers Agency, EI, IDA, Shannon Development & PwC Derived

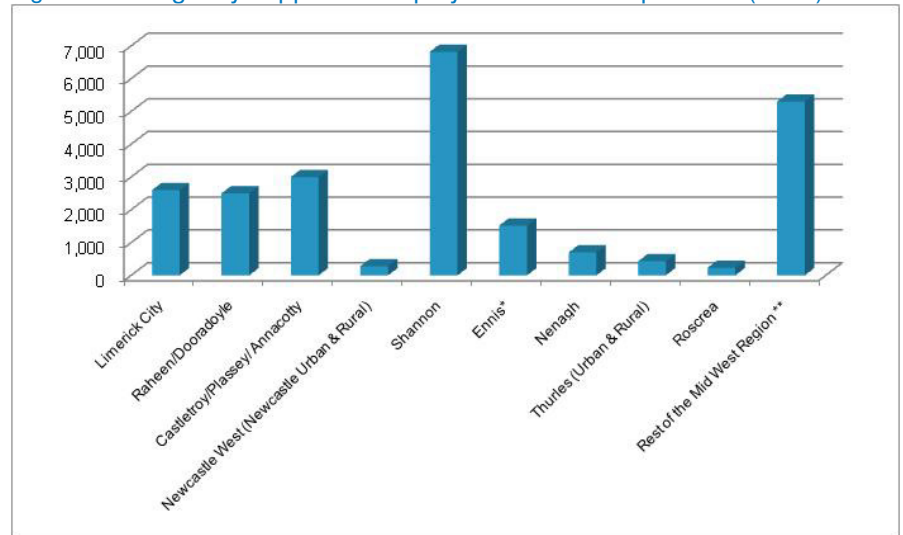
Limerick City has the highest number of public sector employees.

Dept. of Finance, Dept. of Science and Education, HSE Employers Agency and the HEA, 2009

The figure above shows the number of agency supported employees per area. Key findings are:

- Shannon has the highest number of agency supported employment followed by the Castletroy/Plassey and Annacotty area and Limerick City.
- Roscrea has the lowest number of agency supported employment.

Figure 1.2: Agency supported employment numbers per area (2009)



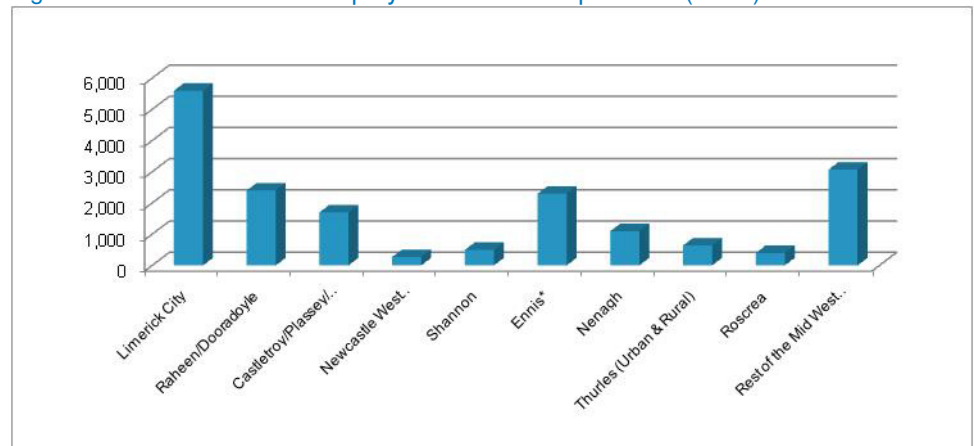
Source: IDA, EI, Shannon Development, 200, PwC Derived

Ennis – includes (Urban 1-4, Rural, Spacehill, Clareabbey, Dorra, Kilnamona). ** Rest if the Mid West Region – includes the other key employment areas

The chart below shows public sector employees per area. Key findings are:

- Limerick City has the highest number of people employed in the public sector followed by the Raheen/Dooradoyle area and the Ennis area.
- Newcastle West has the lowest number of people employed in the public sector.

Figure 1.3: Public sector employment numbers per area (2009)



Source: DoF, DoS&E and HSE Employers Agency. PwC Derived

Table 1.14: Key sectors per area, agency supported employment (2009)

Key Sectors	Computer	ICT -software	ICT consultancy	Basic &	Food	Healthcare	Pharmaceuticals	Machinery	Financial & International	Aerospace	Rubber * plastics	Wood & Wood
Limerick City				✓	✓	✓						✓
Raheen/Dooradoyle	✓				✓	✓						
Casteltroy/Plassey/Anacotty	✓	✓	✓	✓		✓						
Newcastle West					✓			✓				
Shannon	✓	✓		✓		✓	✓	✓	✓	✓		
Ennis	✓						✓					
Nenagh					✓		✓	✓				
Thurles					✓							
Roscrea					✓		✓					
Rest of the Mid West Region (inc; other key employment clusters)					✓			✓			✓	✓

Source: IDA, EI, Shannon Development, 2009

Agency Supported Employment

Agency supported employment peaked in 2000 at 33,000. In 2008, agency supported employment in the Mid West Region stood at approximately 28,300 full time employees (FTEs) representing approximately 17% of employment in the Region. This compared to the national average of 15%. However, in 2009 the number of jobs fell by over 19% to approximately 22,800 (FTEs)³¹.

Figure 1.5 shows the trends in agency supported employment, per sector, between 1998 and 2008. Key findings are:

Computer & electronics and electrical equipment (manufacturing) is the largest sector in terms of agency support employment, representing 23%. Employment in this sector is mainly accounted for by a number of large multinational manufacturing firms such as Dell, and Analog

³¹ Source: Forfás, Annual Employment Survey 2009

Devices. However, this sector has experienced significant decline, approximately 2,500 jobs. It should be noted that 2008 data, does not account for the significant jobs losses (approximately 1,900) at Dell.

Sectors representing **machinery and equipment or other engineered products** (basic & fabricated metal products, electrical equipment, machinery & equipment & transport equipment) represent the next biggest sector representing c. 15%. Companies in this sector include Hegarty Metal Processors, Shortt Stainless Steel Limited and Foynes Engineering Limited. This sector has experienced a significant loss in jobs, approximately 1,350.

Computer, electronic and electrical equipment (manufacturing) is the largest sector in terms of employment, accounting for 23% of agency supported employment in the Region.

Forfás, 2010

Food, drink & tobacco represent c.12% of employment and has only experienced a small decline in job numbers since 1998. Key companies in this sector are Wyeth Nutritionals, Rosderra Meats (formerly Glanbia Meats), Shannon Region Organic Meat Coop etc.

ICT represents 8.5% of employment, an increase of c. 900 jobs. A key company in this sector are Broadword Technology (BST) Ltd. trading as Accendo Technologies.

Business & financial services represent c. 8% of employment, an increase in c. 1,300 jobs. However, international services are much less developed than in Dublin, the leading Region in this regard. Key companies in this sector are GE Capital Services, Banta, Avvio etc.

Life sciences (chemical and medical and dental instrument & supplies) account for c. 13% (3,726). While the chemical sector had declined by c. 130 jobs, medical and dental instrument & supplies had increased by 1,000 jobs. Key companies in this sector are Cook Ireland, Zimmer, Vistakon etc³².

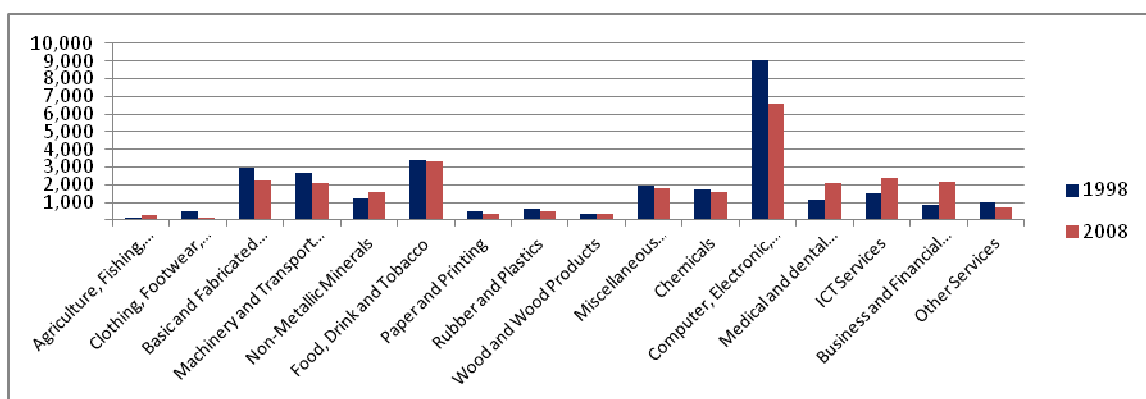
³² Source: Forfás 2010

Table 1.15: Agency supported employment numbers per sector in the Mid West Region (1998-2008)

All Sectors	Nos. Employed			% Employed		
	1998	2008	Change	1998	2008	Change in %
Agriculture, Fishing, Forestry, Mining and Other Industry	148	290	142	0.5%	1.0%	95.9%
Clothing, Footwear, Leather and Textiles	518	137	-381	1.7%	0.5%	-73.6%
Basic and Fabricated Metal Products	2,987	2,245	-742	10.0%	7.9%	-24.8%
Machinery and Transport Equipment	2,705	2,094	-611	9.1%	7.4%	-22.6%
Non-Metallic Minerals	1,208	1,559	351	4.1%	5.5%	29.1%
Food, Drink and Tobacco	3,407	3,349	-58	11.4%	11.8%	-1.7%
Paper and Printing	479	387	-92	1.6%	1.4%	-19.2%
Rubber and Plastics	662	494	-168	2.2%	1.7%	-25.4%
Wood and Wood Products	360	342	-18	1.2%	1.2%	-5.0%
Miscellaneous Manufacturing	1,931	1,803	-128	6.5%	6.4%	-6.6%
Chemicals	1,733	1,605	-128	5.8%	5.7%	-7.4%
Computer, Electronic, Optical and Electrical Equipment	9,046	6,568	-2,478	30.4%	23.2%	-27.4%
Medical and dental instruments and supplies	1,154	2,131	977	3.9%	7.5%	84.7%
ICT Services	1,541	2,397	856	5.2%	8.5%	55.5%
Business and Financial Services	899	2,188	1,289	3.0%	7.7%	143.4%
Other Services	1,001	701	-300	3.4%	2.5%	-30.0%
Total	29,779	28,290	-1,489	100%	100%	-5.0%

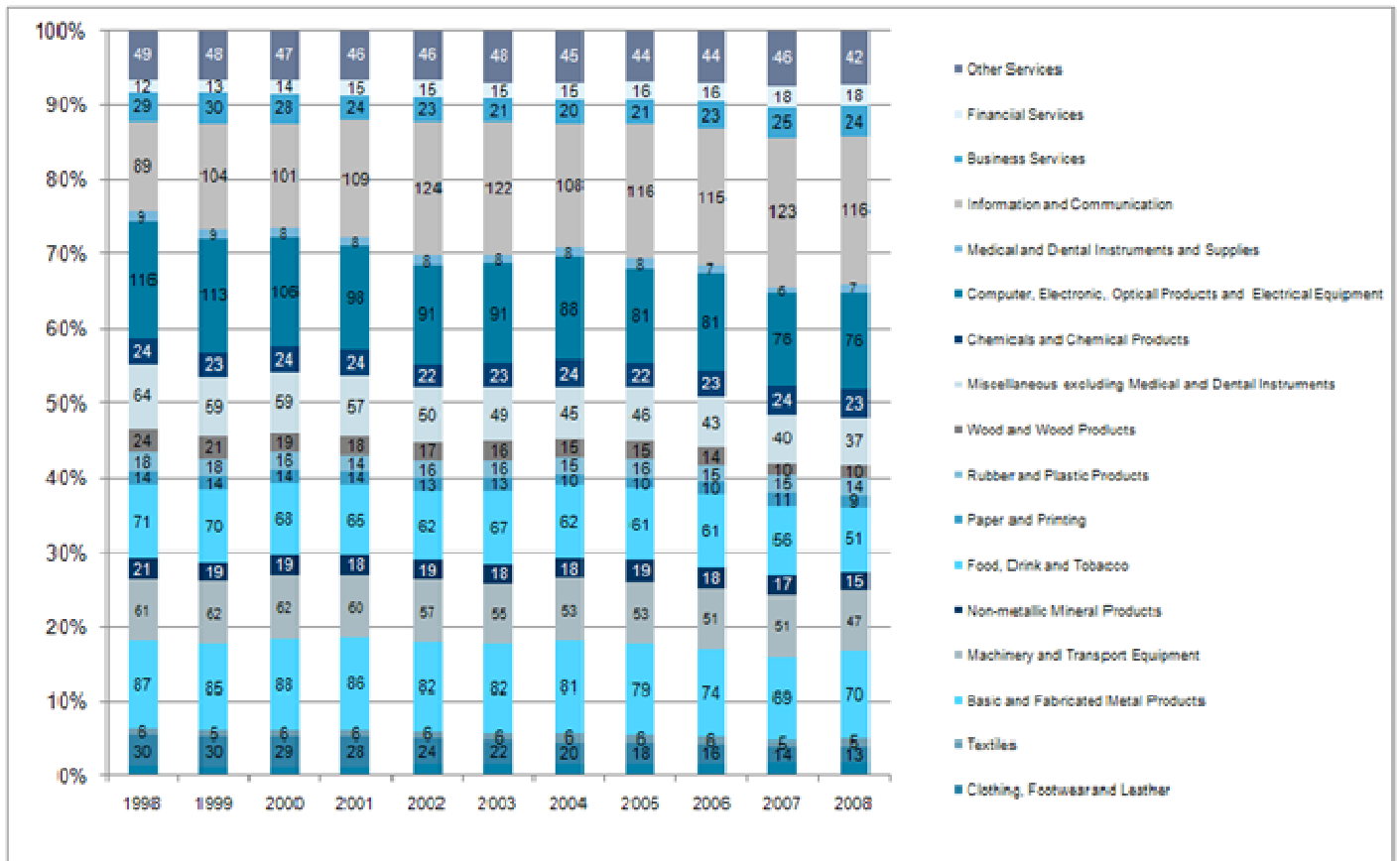
Source: Forfás, 2010

Figure 1.4: Agency supported employment numbers per sector in the Mid West Region (1998-2008)



- Increase of 27 (30%) in information & communication companies.
- Decrease of 40 (35%) in computer, electronic, optical products and electrical equipment companies.
- Decrease of 17 (57%) in clothing, footwear and leather companies.
- Decrease of 20 (28%) in food, drink and tobacco companies.
- Decrease of 14 (58%) in wood and wood products companies.

Figure 1.5: Agency supported companies per sector (1998-2008)



Source: Forfás, 2010