

Land-based and Environmental Industries

Businesses in the land-based and environmental sector enhance the quality of life for everyone in Yorkshire and Humber. They improve well-being, supply quality assured food production, ensure the health and welfare of animals, provide leisure activities, enrich the rural environment and urban green space and protect our natural heritage.

Overview

Business figures

- Official statistics estimate that there are 12,900 businesses in the sector in Yorkshire and Humber
- As official data excludes many land-based and environmental industries, Lantra estimates there are about 16,600 businesses in the sector in the region
- Lantra figures are 29% greater than the figure obtained through official data sources.

Businesses by size¹

- The sector in the region is dominated by micro-businesses
- 97% of businesses in the sector in Yorkshire and Humber have a workforce of ten staff or fewer, compared with 81% across all sectors in Yorkshire and Humber.

Employment figures

- Official statistics estimate that there are 44,900 people employed within the sector in Yorkshire and Humber
- As official data excludes many land-based and environmental industries, Lantra estimates there are about 88,350 employees in the sector in the region
- Estimated figures are 97% greater than the figure obtained through official data sources.



Size and scope

Industry	Businesses 1,4,5,7,8		Employment 2,4,5,7,8,9	
	Count	%	Count	%
Agricultural crops ³	3,310	20%	5,775	7%
Agricultural livestock ³	3,970	23%	25,775	29%
Animal care	1,660	10%	18,400	21%
Animal technology	n/a	n/a	n/a	n/a
Aquaculture	40	<1%	250	<1%
Environmental conservation	180	1%	7,550	9%
Equine	2,060	12%	3,450	4%
Fariery	200	1%	200	<1%
Fencing	340	2%	1,950	2%
Fisheries management	20	<1%	50	<1%
Floristry	800	5%	950	1%
Game and wildlife management	700	4%	1,600	2%
Horticulture, landscaping and sports turf	1,140	7%	7,050	8%
Land-based engineering	180	1%	1,050	1%
Production horticulture	1,500	9%	7,700	9%
Trees and timber	160	1%	1,200	1%
Veterinary activities	340	2%	5,400	6%
Total^{12,13}	16,600	100%	88,350	100%

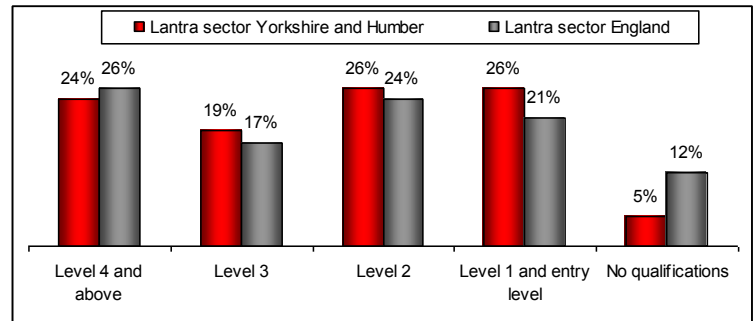
Workforce demographics^{9,12}

Gender			
Male	73%	Female	27%
Age band			
16-24	10%	45-54	24%
25-34	17%	55-64	13%
35-44	24%	65+	11%
Employment			
Full-time	76%	Part-time	24%
Self-employment			
Employee	53%	Self-employed	43%
Unpaid family worker			5%
Occupations			
Managers and senior officials (e.g. farm, forest, shop, zoo or practice managers)			12%
Professional occupations (e.g. veterinary surgeon, manufacturing service engineer)			6%
Associate professional and technical occupations (e.g. community ranger, head green keeper)			4%
Administrative, clerical and secretarial occupations (e.g. farm secretary)			2%
Skilled trade occupations (e.g. farmer, tree surgeon, florist)			39%
Personal service occupations (e.g. veterinary nurse)			8%
Sales and customer service occupations (e.g. pet shop assistant)			4%
Transport and machine operatives (e.g. tractor/machine/chainsaw operative)			1%
Elementary occupations (e.g. fruit picker)			22%



Qualifications^{9,12}

The sector workforce is highly skilled, however this is often developed through non-accredited training methods rather than full-accredited qualifications, and is frequently not officially recognised. Official statistics show 24% of the workforce are qualified to Level 4 and above (compared to 23% in England), 5% have no qualifications (compared to 12% in England).



Learning supply

- Learning supply information for the region is not available, therefore England data is used
- The sector is served by approximately 270 providers
- 34 of these are specialist land-based providers and are members of Landex
- An estimated 109,000 learners undertook sector qualifications or training courses in 2008/09
- For further information about current provision, please refer to Lantra's Assessment of Current Provision for England.

Employment projections 2010-

- In the next ten years (2010 to 2020) the sector will need a minimum of 22,000 more people
- The largest need for people is expected to be for sales and customer service occupations (4,000) and managerial occupations (4,000)
- Over the period 2010-2020, the following number of people will be needed:
 - 1,000 people at qualification Level 5 (postgraduate)
 - 4,000 people at Level 4 (graduate)
 - 5,000 people at Level 3 (A Level)
 - 6,000 people at Level 2 (GCSE A-C)
 - 4,000 people at Level 1 (GCSE D-G)

Skills issues¹¹

Regional information for skills issues is not available for the sector, therefore England data has been used.

Incidence of skills shortage vacancies

- Of the sector employers, 7% had a vacancy at the time they were surveyed
- The most common reason for vacancies was due to skills shortages. This is compared with 12% for all employers and highlights the low level of vacancies within the sector.

	Lantra England	All England
% with a vacancy	7%	12%
% with a hard-to-fill vacancy (HtFV)	3%	3%
% with a skills shortage vacancy (SSV)	2%	3%
HtFVs as a % of vacancies	43%	22%
SSVs as a % of vacancies	32%	16%

Incidence of skill gaps

- 15% of businesses in the sector reported a skills gap (i.e. the extent to which employees are work ready) compared to 19% overall in England.

	Lantra England	All England
% of establishments reporting skill gaps	15%	19%
Number of employees with a skill gap	26,500	1,702,500
Skill gaps as % of employment	6%	7%

The sector has changed in recent years leading to an increase in demand for highly skilled staff. Current skills employers feel are important to the sector are:

- Technical skills (e.g. animal handling and care; disease identification and control; implementing new technology including genetic engineering)
- ICT skills (e.g. robotics)
- Leadership/management skills (e.g. succession planning; entrepreneurial skills)
- Essential skills (i.e. literacy, numeracy and communication).

Drivers for change

Economic conditions

- Impact of the recession
- Understanding and responding to changing consumer demand
- Urban/rural regeneration
- Sustainability/globalisation of markets.

Impact on skills

- Business advice, guidance and support
- Business management skills
- Sales and marketing
- ICT and commerce.

Labour supply

- Attracting skilled new entrants of all ages
- Succession planning by industry
- Providing opportunities for career progression and development
- Influencing migration policy.

Impact on skills

- Effective marketing of careers
- Better careers advice and guidance for all
- Proper recognition of competence for all
- Integrated frameworks to support lifelong learning and Continued Professional Development (CPD)
- Entrepreneurial education.

Climate change

- Reduction in greenhouse gas (GHG) emissions
- Voluntary action plans to reduce GHG
- Need to adapt to changing climate in the longer term
- Increased incidence of flood events.

Impact on skills

- Adoption of methods to mitigate climate change, such as sustainable business practice
- Businesses having to respond to climate change
- Respond to specific skills/re-skilling issues.

Energy and fuel security

- Cost to business of fuel and energy
- Use of waste as a resource, e.g. anaerobic digestion
- Sector as a supplier of bio-mass and bio-fuel.

Impact on skills

- Research community to provide knowledge
- Knowledge of new agronomy techniques
- Development of bio-mass supply chains.

Food safety and security

- Food 2030 strategy, increased Government interest in food security and continuity of supply
- Food quality, traceability and quality assurance
- Proposals on food information for consumers
- Consumer behaviour with demands for greater convenience and healthy lifestyles
- Developments in trade markets and supply chains
- New approaches to land management i.e. conflicting priorities for land use, water framework directive.

Impact on skills

- Business management skills
- Risk management
- Business advice, guidance and support
- Information and communications technology
- Supply chain management
- Contract management and negotiation
- Production methods and animal welfare
- Sales and marketing
- Catchment sensitive land management.

Animal health and welfare

- Higher standards required of all people handling animals
- Legislation relating to animal transport.

Impact on skills

- Development of integrated CPD across all practitioners
- Recognition of competence
- Skills relating to animal handling and care, disease identification, control and bio-security.

Health and safety

- Legislative requirements
- Safer working environment
- Reduction in occupational hazards to minimise ill health.

Impact on skills

- Awareness raising, knowledge of requirements and how to comply
- Improved learning provision in terms of CPD
- Recognition of health and safety competence.

Technology change and knowledge transfer

- Increasing business efficiency through technology
- Environmentally sustainable businesses
- Better integration of knowledge transfer into skills programmes.

Impact on skills

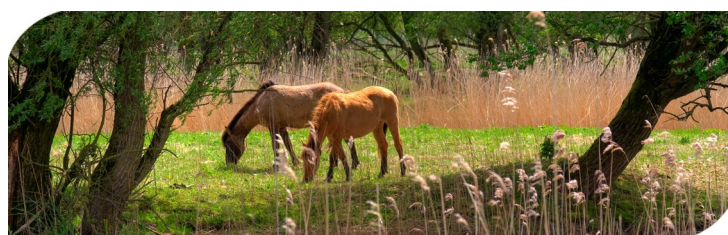
- Research into new methods and processes, e.g. soil science, animal nutrition, advanced agronomy and pathology
- Technology transfer
- Business development
- New technologies (i.e. precision farming and use of Global Positioning Systems [GPS])
- Higher level technical skills for new production methods
- More flexible employer focused training.

Sources and information

Sources

- ¹ Inter-Departmental Business Register (IDBR) 2010
- ² June Survey of Agriculture and Horticulture 2009
- ³ Figures for Agriculture Services have been incorporated into these categories
- ⁴ Experian National Database 2010
- ⁵ Institute of Animal Technology (IAT) 2008
- ⁶ Lantra primary research 2010
- ⁷ Farriers Registration Council 2010
- ⁸ The British Association for Shooting and Conservation (BASC) 2006
- ⁹ Labour Force Survey (LFS) 2009-2010
- ¹⁰ Lantra Model for Employment Forecasting 2010. Figures represent estimates of minimum job openings to satisfy replacement and expansionary demand. This may be higher or lower depending on future conditions
- ¹¹ National Employer Skills Survey 2009
- ¹² Figures and percentages may not add up due to rounding
- ¹³ Percentages are calculated from unrounded figures.

More information about Lantra research can be found at:
www.lantra.co.uk/research



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