# LANTRA North West Factsheet 2010-2011

# **Land-based and Environmental Industries**

Businesses in the land-based and environmental sector enhance the quality of life for everyone in North West England. 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 13,750 businesses in the sector in North West England
- As official data excludes many land-based and environmental businesses, Lantra estimates there are about 18,200 businesses in the sector in the region
- Estimated figures are 32% greater than the figure obtained through official data sources.

#### **Businesses by size<sup>1</sup>**

- The sector in the region is dominated by microbusinesses
- 97% of businesses in the sector in the North West of England have a workforce of ten staff or fewer, compared with 81% across all sectors in the region.

#### **Employment figures**

- Official statistics estimate that there are 49,300 people employed within the sector in North West **England**
- As official data excludes many land-based and environmental employees, Lantra estimates there are about 104,600 employees in the sector in the region
- Estimated figures are 112% 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	
Agricultural crops <sup>3</sup>	1,050	6%	1,830	2%
Agricultural livestock <sup>3</sup>	6,270	35%	29,570	28%
Animal care	2,260	12%	26,250	25%
Animal technology	n/a	n/a	n/a	n/a
Aquaculture	20	<1%	550	1%
Environmental conservation	240	1%	8,450	8%
Equine	2,760	15%	2,625	3%
Farriery	220	1%	200	<1%
Fencing	360	2%	1,850	2%
Fisheries management	20	<1%	50	<1%
Floristry	1,080	6%	1,350	1%
Game and wildlife management	760	4%	2,700	3%
Horticulture, landscaping and sports turf	1,560	9%	12,750	12%
Land-based engineering	160	1%	1,350	1%
Production horticulture	860	5%	9,800	9%
Trees and timber	180	1%	350	<1%
Veterinary activities	440	2%	4,950	5%
Total <sup>12,13</sup>	18,220	100%	104,650	100%

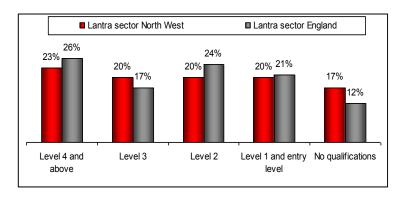
# **Workforce demographics**9,12

Gender					
Male	68%	Female	32%		
Age band					
16-24	14%	45-54	24%		
25-34	19%	55-64	15%		
35-44	23%	65+	6%		
Employment					
Employee	54%	Self-employed	44%		
Unpaid family work	Unpaid family worker				
Ethnicity					
White	100%	Non-white	0%		
Occupations					
Managers and senior officials (e.g. farm, forest, shop, zoo or practice managers)			8%		
Professional occupations (e.g. veterinary surgeon, manufacturing service engineer)			6%		
Associate profession occupations (e.g. or green keeper)	3%				
Administrative, cleroccupations (e.g. f	3%				
Skilled trade occup surgeon, florist)	50%				
Personal service or nurse)	6%				
Sales and custome pet shop assistant)	9%				
Transport and mac tractor/machine/ch	0%				
Elementary occupations (e.g. fruit picker)			14%		



# Qualifications<sup>9,12</sup>

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 23% of the workforce are qualified to level 4 and above (compared to 26% in England), 17% 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 (5,000), managerial occupations (4,000) and skilled trades occupations (3,000)
- Over the period 2010–2020, the following number of people will be needed:
  - 1,000 people at qualification Level 5 (postgraduate)
  - 6,000 people at Level 4 (graduate)
  - 5,000 people at Level 3 (A Level)
  - 5,000 people at Level 2 (GCSE A-C)
  - 4,000 people at Level 1 (GCSE D-G)
- Forecasts suggest that 2,000 people without qualifications will be needed.

# Skills issues<sup>11</sup>

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**

- <sup>1</sup> Inter-Departmental Business Register (IDBR) 2010
- June Survey of Agriculture and Horticulture 2009
- <sup>3</sup> Figures for Agriculture Services have been incorporated into these categories
- <sup>4</sup> Experian National Database 2010
- <sup>5</sup> Institute of Animal Technology (IAT) 2008
- <sup>6</sup> Lantra primary research 2010
- <sup>7</sup> Farriers Registration Council 2010
- The British Association for Shooting and Conservation (BASC) 2006
- Labour Force Survey (LFS) 2009-2010
- 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
- National Employer Skills Survey 2009
- 12 Figures and percentages may not add up due to rounding
- <sup>13</sup> Percentages are calculated from unrounded figures.

More information about Lantra research can be found at: <a href="https://www.lantra.co.uk/research">www.lantra.co.uk/research</a>



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