

# Sussex Local Skills Improvement Plan

## Land Based Sector Deep Dive (including Agriculture and Viticulture)

### Executive Summary

February 2023

# Content

<b>Content</b>	<b>Page</b>
Foreword and Project Focus	3
Definition of the Land based Sector	4
Industry trends	5
Identified skills needs	9
Challenges and priorities for change	10
Conclusions and recommendations	13

# Foreword and Project Focus

## Foreword

Local Skills Improvement Plans (LSIPs) were introduced in the Skills for Jobs White Paper in January 2021 and are now part of the Skills and Post-16 Education Act, which became law in April 2022.

They are a key part of the Government's transformational vision of an adult skills system where businesses, particularly SMEs, are given a much stronger voice in local skills planning.

The plans will help ensure provision is more responsive to emerging and changing skills needs. Being locally driven, they can be tailored to the challenges and opportunities most relevant to the area.

Sussex Chamber of Commerce is one of eight employer representative bodies that took part in the LSIP Trailblazer project to test this employer-led approach to skills planning.

The LSIP Key Sector Deep Dive projects were identified within the LSIP Trailblazer's [Future Skills Sussex Improvement Framework \(FSSIF\)](#) and now form part of the LSIP refresh report which will be developed and submitted to the Secretary of State in May 2023.

We would like to thank all the employers, partner organisations and stakeholders that have contributed to the Deep Dive projects.

## Project Focus

This document is an **Executive Summary** of the Deep Dive Evidence Base Report for the Land Based Sector. It highlights the key industry trends, the challenges faced and the priorities for change. It also sets out conclusions and recommendations.

The full **Evidence Base report** into the skills needs of the sector was carried out over 3 months to fit with Government timescales and is a snapshot in time.

Our stakeholder engagement leads carried out extensive research and engaged with employers and wider stakeholders across Sussex to give us broad baseline evidence.

The full report is a toolkit of useful and relevant information providing links to existing research, initiatives and good practice that can be used as exemplars for future Sussex projects. It can be used as a resource to enable business, education and support organisations to work together to address the current and future skills needs of the sector in Sussex.

We will continue to build on the evidence over the next three years through ongoing skills conversations and intelligence gathering.

# Definition of the Land based Sector



[The land-based sector](#), which is referred to by the UK Government as the Agriculture, Environmental and Animal Care sector, includes a wide range of work and careers. The term 'land-based' traditionally relates to farming and industries connected to the land and environment, including horticulture, food production, forestry, conservation, landscaping, and equine (horses). This deep dive also includes viticulture.

The following Standard Occupational Codes (SOC) have been used to frame the Evidence Base Report.

Feedback has suggested that these codes are not entirely representative of the wide range of occupations that make up the land-based sector.

SOC code	Industry
9111	Farm Workers
5112	Horticultural Trades
5111	Farmers
1211	Managers and Proprietors in Agriculture and Horticulture
5119	Agricultural and Fishing Trades n.e.c.
9119	Fishing and Other Elementary Agriculture Occupations n.e.c.
6139	Animal Care Services Occupations n.e.c.
8223	Agricultural Machinery Drivers
8211	Large Goods Vehicle Drivers
5211	Smiths and Forge Workers
5113	Gardeners and Landscape Gardeners
9112	Forestry Workers
8134	Weighers, Graders and Sorters

# Industry Trends

The South-East of England agriculture and forestry sector is a vibrant, dynamic part of the regional economy. It directly **employs over 50,000 people**, has sales of over **£2billion and GVA of £1.25billion**. ([NFU report](#))

The region is unique in England in having an almost balanced split between horticulture, arable and livestock production. Expertise in intensive crops and the region's climate and soils means it is also the centre of the UK's growing **viticulture** sector, which has **grown by 400% since 2000**. Reports suggest the sector will grow by a further **400% by 2040**, with over **70% of this growth in the South-East creating 21,000 jobs**.

The region's livestock sector is focused on cattle with **10% of the English beef herd** and **6% of the dairy herd**. It also has **6% of the pigs** and **8% of the English sheep flock**. In poultry, where it has 8% of the total English flock, the real **strength is in egg production with 14% of the English laying flock**.

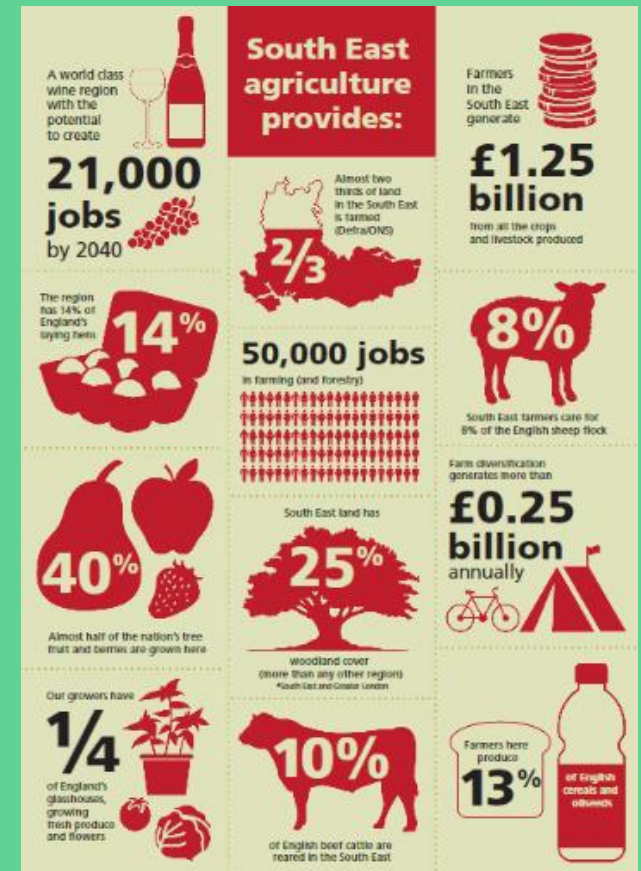


# Industry Trends

The South-East has more **woodland** than other regions at **25% of its land area**, which **supports 7,400 jobs** with 32% of English forestry workers and 10% of the wood processing workers.

[Growers, within West Sussex](#) form a significant part of the local economy producing a retail value of more than **£1 billion per year and employing over 10,000 full-time equivalent staff**. Located mainly on the coastal plane, they are home to the largest area of glasshouse production in England.

[Challenges post Brexit](#)- relating to future policy direction, the financial sustainability of businesses and available workforce - along with increasing costs -including energy and fertilizer costs - are raising questions about [food security and sustainability](#) of the land-based sector.



# Industry Trends

## Specification of employer skills needs

There are many different entry points into finding work within the land-based sector. Land-based roles account for only 0.4% of all jobs across Sussex. Mechanisms used to recruit into jobs varies depending on the sector and role E.g., Word of mouth (specialised local roles such as estate managers), connection with farming families, responding to speculative CVs and the use of recruitment agencies (seasonal workers as well as skilled jobs). Research by [The Institute of Agriculture and Horticulture](#) (TIAH) highlighted that agricultural contractors remain the main source of labour for the sector.

**£22.5k**  
median  
advertised  
salary

Accounting for  
**0.4%**  
of all job postings

Source: Lightcast – November 2022

Top 5 most advertised occupations	Median advertised salary
Gardeners and Landscape Gardeners	£19,800
Animal Care Services Occupations n.e.c.	£15,600
Fishing and Other Elementary Agriculture Occupations n.e.c.	£24,100
Farm Workers	£24,600
Weighers, Graders and Sorters	£27,100

Top 5 most advertised job titles	Median advertised salary
Gardeners	£22,800
Grounds Maintenance Operatives	£20,800
Groundspeople	£21,200
Landscapers	£24,000
Dog Groomers	£19,800

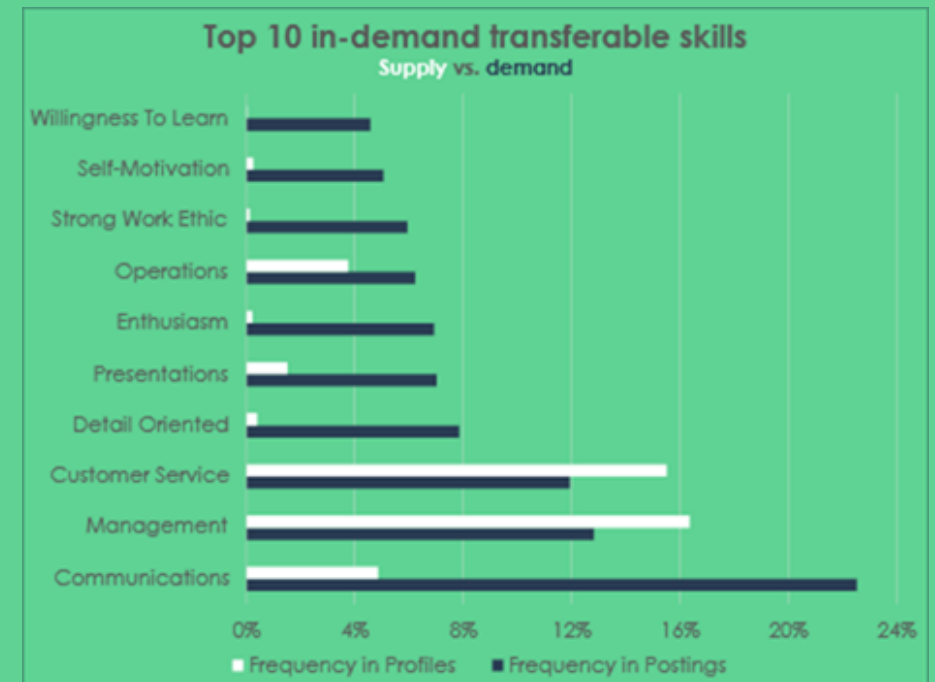
# Industry Trends

**Businesses in the sector need more staff** across all jobs areas and for those people to have a **higher skill set**.

There are specific **recruitment challenges** within the land-based sector such as a lack of **affordable housing** in rural areas and little or **no public transport**.

Other barriers such as unsociable hours, competition from other industries which pay better and a lack of interest in the sector from domestic workers make the sector unattractive. **There is still a lack of understanding about the diverse work offer within the sector**.

Businesses will consider employing people with less specialised skills if they have the right transferable skills such as a willingness to learn, attitude, aptitude and professionalism.



Source: Lightcast – November 2022

# Identified skills needs

One to one Interviews with employers and sector reports highlighted the following skills needs for the land-based sector. They fall into 5 groups:

- Skills needed to grow the capability of the sector,
- Specialised skills,
- Skills needed to maintain standards,
- Skills for the future, and
- Transferable skills.

Source: [Pye Tait sub sector reports \(2019\)](#), [TIAH labour and skills Research \(2022\)](#), [SELEP Planning and Prioritisation of Future Skills sub sector reports \(2020\)](#)

Specialised Skills	Skills needed to grow the capability of the sector	Skills needed to maintain standards	Skills for the Future
Use of specialist machinery (Arboriculture, Horticulture, Viticulture) Nursery husbandry skills Skilled Tree Surgeons Plant science/knowledge (Horticulture, Viticulture) Engineering (Horticulture, Viticulture) Tractor driving with certificate (Agriculture) Wine making (Viticulture) Hospitality (Viticulture) Food production management Sports ground care and maintenance	Leadership and people management Change Management Business Finances Supervisory Skills IT Skills (basic and advanced) Business operation skills Communication/ social media Sales and Customer Service Recruitment Supply chain management	Health and Safety Quality Management Compliance/ Assurance accreditation Scheme Environmental Management Regulation Legislation	Arboriculture science Environmental, landscape and nature conservation Biosecurity Data analytics Robotics/ artificial intelligence Precision viticulture Use of technology in winemaking Growers with computer system experience Sustainable livestock production systems
<b>Transferable Skills</b>	<ul style="list-style-type: none"> <li>• Problem solving</li> <li>• Professionalism</li> <li>• Aptitude/ willingness to work</li> <li>• Open to learning</li> </ul>		

# Challenges and priorities for change

- This is a **vital sector for the region in terms of sustainability and food security**. **Businesses need a diverse skills base to build capability consistently across businesses in the sector.**
- Skills and knowledge needs can be broken down into 4 distinct groups:
  - Skills needed to grow the **capability of the sector**; leadership, business management, recruitment and IT
  - Sector specific skills; employers are looking for **higher skilled people** across all job groups.
  - Skills and knowledge to maintain standards of quality and safety.
  - Skills and knowledge that will be needed for the future. This is being driven by the need to become more productive and sustainable. Recruitment challenges mean the **sector is looking to technology and science to support transformation.**
- The Institute for Apprenticeships and Technical Education highlight the potential of Level 4+ management apprenticeships which will respond to the capability challenges of the land-based sector. Current recruitment challenges may impact on uptake of these qualifications as they come forward.
- **Employers find it difficult to recruit enough staff**; staff with the right technical and transferable skills. Growers in particular are finding it hard to recruit domestic staff and are still reliant on overseas seasonal workers. As a result, employers are willing to recruit less skilled people if they have the right transferable skills.

# Challenges and priorities for change

- **Unsociable hours, competition from other sectors, the lack of a good public transport system and the lack of affordable housing are barriers to working in the sector.** Employers are trying to be innovative in the way they work by introducing flexible contracts, but this sector will require people to be at their place of work which post covid is not always a preferred choice.
- **People are not aware of the diverse careers and jobs within the land-based sector.** There is a need for a long-term strategy to address this, starting from school age through to adult education and continuing professional development. There is good practice going on that could be built on, e.g., enterprise advisors in schools.
- **Releasing staff for training is the main barrier to training coupled with associated costs which includes transport costs** to attend an off-site venue.
- Employers spoke of an **overly complicated funding landscape which can be difficult to access** while providers thought the **inflexibility of funding** (specifically AEB funding) made it difficult for them to respond to employer needs.
- Reflecting on the diversity of businesses in the sector it is not surprising that **employers want choice** when it comes to a skills offer. **A mixed approach is needed, one that meets employers where they are and will require providers to be considerate of age, education, ability, and likely skill levels of current staff to be as inclusive as possible.**

# Challenges and priorities for change

- **Providers are working well with businesses** to inform the skills offer for the sector. This reflects long term relationship building which can be a struggle over time with both **employers and providers reflecting on capacity issues**.
- **Providers are finding it difficult to recruit tutors and teachers** with the right technical and teaching skills for the sector. Employers are open to investing in the skills offer although capacity issues are likely to impact their ability to engage with this.
- **The sector could become 'more open' to diverse groups**. Neuro diverse groups and people with additional needs might find the sector attractive because of the nature and structure of the work. People living in urban spaces involved in community food projects might be attracted to the sector and those people not in work could be open to working. **Businesses would need to be supported to make this change and overcome barriers such as transport to work**.
- Businesses are supporting **Net Zero** targets, adapting to climate change or meeting other environmental goals. Some of this activity is being driven by national initiatives or business pressures to reduce costs and there was a call for **better coordination of activities to make the most of them**. **Businesses also called for opportunities to share best practice to help them understand what this might look like for their business**.

# Summary Table of recommendations

Recommendation	Description	Challenges this addresses
<p>Create a pan Sussex structure, building on what is already happening, to improve the planning and coordination of activities to support an employer led skills offer to the land-based sector; one that builds the capability of the sector.</p>	<p>A group made up of employers, providers and sector bodies that would co-create and co-deliver activities and training to respond to the challenges of the land-based sector, including sourcing funding as and where appropriate to develop the work. Better planning and coordination across Sussex as a whole would ensure that most could be made of the resources available to grow and develop capability across the sector.</p>	<ul style="list-style-type: none"> <li>• The challenges of the sector are significant and require a collective response.</li> <li>• There is not enough people coming into work in the sector, particularly those with higher technical and transferable skills.</li> <li>• Barriers such as the lack of public transport and affordable housing are better positioned to decision makers as a group rather than in isolation.</li> <li>• Science and technology can be better leveraged to support transformation of the sector.</li> </ul>
<p>Improve the evidence base for the land-based sectors.</p>	<p>Continue to build and develop networks with employers to capture information to inform an employer led skills-based offer.</p>	<ul style="list-style-type: none"> <li>• Engagement with businesses from across the sector has been patchy.</li> <li>• SOC codes are not representative.</li> </ul>

# Summary Table of recommendations

Recommendation	Description	Challenges this addresses
Long term planning to support promotion of the sector to targeted groups of people.	Long term planning between employers and providers would deliver a sustained programme of engagement and activities to build awareness of the land-based sector building on existing good practice. A coordinated approach would help scale activity across Sussex in order to have impact.	<ul style="list-style-type: none"><li>• Young people coming through schools and colleges and other diverse groups are unfamiliar with careers and jobs in the land-based sector.</li><li>• Adults, not in work, have negative perceptions about the sector.</li></ul>
Develop knowledge exchange opportunities to help businesses improve their understanding of the skills needed to become Net Zero.	Employers and providers working together to showcase examples of best practice.	<ul style="list-style-type: none"><li>• This would help businesses better understand the impact on their businesses and the required skills to transition to become Net Zero.</li></ul>
Explore the use of existing funding to be used flexibly to meet the needs of employers.	Identify local flexibility in provision to meet the needs of employers and that enables employers to overcome capacity issues and engage in training	<ul style="list-style-type: none"><li>• This would enable an employer led skills offer.</li></ul>

**Published by Sussex Chamber of Commerce**

**Website: [Sussex Chamber of Commerce](https://www.sussexchamber.com)**

**Report written by: Nora Davies**