

Cambridge Centre
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Economic analysis of the Wisbech travel to work area

Main report

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1. Introduction

The Wisbech 2020 Vision is a plan to address the current and future challenges facing Wisbech and to maximise the opportunities available to the town and its surrounding area. The Vision's aim is to create a bold but realistic plan for the future success of the Wisbech area and to agree a route map of how to secure it.

One of the key action points set out in the Vision statement was to produce a report providing a steer on the key economic sectors which the Wisbech area should focus upon and to analyse the competitive strengths as well the potential constraints to the growth of these sectors.

The University of Cambridge was commissioned to undertake this research. The aim of the research was to assess:

- The current economic profile of the Wisbech travel to work area (TTWA);
- The sectors of the local economy most likely to have potential for future employment growth and higher productivity levels under different macro-economic scenarios; and to
- Make recommendations on ways to support a high value-added growth strategy.

The research identified the agriculture/horticulture and food processing sectors – collectively called the agri-food sector – as the part of the local economy most likely to achieve future growth. The report makes recommendations for supporting growth into the future.

The research was funded by the University of Cambridge, Cambridgeshire County Council and Fenland District Council.

2. Methods

1) Review of existing information

The first stage of the project consisted of a desk-based review of current available information, including the work carried out for the Wisbech 2020 Vision, developing a list of sectors for analysis. For the full analysis see Appendix A.

2) Baseline data analysis

This stage was an analysis of employment patterns and past growth/decline for the travel to work area (TTWA) by broad industry sector. For the full analysis see Appendix B.

This element of the work draws on Census and other data sources held by NOMIS (a service provided by the Office for National Statistics to give access to UK labour market statistics) at TTWA level and also at census output area levels. The analysis produced location quotients for the Wisbech TTWA and compared these with those of the district, county, region and nationally. The aim was to identify how far Wisbech includes sectors (and sub-sectors) that are growing nationally and also to see whether there are any sectors or sub-sectors that are growing faster in Wisbech than elsewhere.

3) Econometric analysis of potential gross value added (GVA)

Based on the data analysis, review of existing information and consultation with the project steering group, the most promising sectors of the local economy witnessing growth were selected for further analysis. These were the agriculture, food-processing and retail sectors. An econometric analysis was undertaken of these sectors, with high, medium and low growth scenarios, to assess the likely impact of investment on the GVA of these sectors in the future in the TTWA. The results showed that the agriculture and food-processing sectors (agri-food) had the most potential to achieve higher levels of gross value added in the local economy and the next stage of the research focused on these two sectors. For the full analysis see Appendix C.

4) Stakeholder engagement

A stakeholder engagement exercise was conducted with agri-food businesses in the Wisbech TTWA as well as leading experts in the sector. Its aim was to determine how growth could be achieved. The consultation explored the strengths and barriers to growth of the agri-food sector in the Wisbech TTWA. It also identified the different business strategies adopted to sustain growth as well as the forms of support needed in order to achieve the high value-added growth scenario suggested in the econometric analysis. For the list of stakeholders consulted see Appendix D.

3. Wisbech TTWA economic sectors

Sector review

The first stage of the project consisted of a desk-based review of published reports as well as an examination of the information gathered from the Wisbech 2020 Vision project. Cambridgeshire County Council (CCC) and Fenland District Council (FDC) have carried out economic assessments of the county as a whole and of Fenland District in particular (CCC 2012, 2013; FDC 2009, 2012). Drawing on these reports as well as more specific information on Wisbech (see AECOM 2011), the Wisbech 2020 Vision work and findings from this project's baseline data analysis, a comprehensive list of sectors was compiled.

For each of the sectors listed below, the report considered the constraints to growth that the individual sectors face, specific to the Wisbech TTWA, and also began to identify ways to overcome these challenges.

1. Agriculture/horticulture and food manufacturing sector (agri-food)
2. High value manufacturing sector
3. Logistics and storage sector
4. Construction sector
5. Retail sector
6. Business administration and support services
7. Tourism sector – cultural industries
8. Role of the port in relation to retail, leisure and tourism
9. Creative industries sector
10. Clean-tech renewables sector
11. Public sector

See Appendix A for the report of the sectors that were not taken forward for further analysis.

4. Baseline data analysis of the Wisbech TTWA

Appendix B contains a detailed data analysis of the Wisbech economy based on the Wisbech Functional Area (WFA), which was defined in AECOM (2011). WFA is one of the three segments of the Wisbech Travel-to-work Area (TTWA).

The analysis of the 2011 Census shows that the largest industrial sector in terms of employment was manufacturing with 3,620 residents engaged in the industry, which equates to 20.6% of all residents in employment. The second largest was wholesale and retail (3,095 or 17.6%) and the third was health and social work (1,732 or 9.9%). Looking at the manufacturing sub-sectors, food manufacturing was the largest with 1,758 employees, or 48.6% of manufacturing workers.

The analysis produced location quotients for the Wisbech TTWA and compared these with those of the district, county, region and nationally. A location quotient (LQ) is a way of quantifying how concentrated a particular industry, cluster, occupation, or demographic group is in a particular area or region as compared to the nation. It is a ratio that compares the chosen area to a larger reference region according to some characteristic or asset. This analysis looked at changes in employment by sector in the WFA and compared the proportionate size of each sector with the proportions of the same sector at district, county, regional and national levels. A LQ which is over 1 indicates that the industry's labour force is proportionately larger in the area compared to the national proportion.

The largest LQ was observed in agriculture (5.05). Manufacturing was the second (2.33) and administrative services were third (1.47). Looking at the manufacturing sub-sectors, food manufacturing had a very significant LQ of 8.19.

The largest occupational category was machine operatives with 3,163 persons, which amounts to 18.0% of all residents in employment. The second largest was elementary occupations (3,083 or 17.6%) and skilled trades (2,489 or 14.2%). The smallest occupational group was sales and customer services (1,252 or 7.1%), followed by associate professional (1,374 or 7.8%) and professional (1,445 or 8.2%).

The change in LQ by industry over the inter-census period was also analysed to show which sectors were growing fastest. A positive change in a LQ means the industrial proportion in the local area increased more or decreased less than the national equivalent. The share of agriculture saw the largest growth (1.37). The industry's proportion decreased over the decade but the drop was much smaller than the agricultural share decline at the national level. A change in LQ compared with the region was also the greatest for agriculture in terms of growth. Manufacturing showed the second largest growth (0.90). The second largest decline was in wholesale and retail (-0.16), which experienced a sharp proportional decline.

Changes in the occupational shares over the same decade were analysed. Process, plant and machine operatives had the greatest share increase with 3.5 percentage points. The largest decline was experienced by managers, directors and senior officials (-3.8 points). Associate professional and technical occupations (-1.4), administrative and secretarial

occupations (-1.3) and skilled trades (-1.2) also declined. Full details of the analysis are presented in Appendix B.

The analysis of the different sectors and the existing evidence base suggested that there are several sectors that have growth potential which should be taken forward for further analysis in the next stage of the research. In consultation with the project steering group, the following sectors were selected for further analysis:

- 1) Agriculture sector
- 2) Food manufacturing sector
- 3) Retail sector

There was also economic potential within other sectors analysed, although existing data suggested the agri-food sector had the greatest economic potential. However, there are still potential opportunities for smaller economic gains to be made in particular sectors such as the clean tech renewables sector and its associated supply chain, the logistics and storage sector based on its direct relevance to the agri-food sector and construction sector based on investment in niche markets which is detailed on pages 5, 6 and 9 within the appendices, although these were not explored further in the research.

The rationale for choice of sectors

The agriculture/horticulture and food manufacturing sectors are highly interrelated and form a mature and well-established cluster in the Wisbech TTWA. Its strength has been an important source of stability for the Wisbech local economy, particularly through the recession, with the number of jobs across the sectors remaining broadly constant between 2001 and 2011.

The LQ analysis in this study shows that the share of employment in the agricultural sector witnessed the greatest increase compared to other sectors (1.37). Whilst the proportion employed in agriculture has decreased over the decade, the drop was much smaller than the decline at the national level. Moreover as the industry becomes more sophisticated and there is decline in traditional farm work, opportunities exist to up-skill the workforce and adopt a range of business strategies to increase the gross value added (GVA) of the sector. Adopting such strategies will scale up and capitalise on this sector's importance within the Wisbech economy.

The strength of the food manufacturing sector in the Wisbech area is equally demonstrated in this project's baseline data analysis (Appendix B) which shows that of the manufacturing sub-sectors, food manufacturing is the largest with nearly half of manufacturing workers, and having the largest location quotient (LQ) of 8.19. The smallest LQ was professional occupations (0.47), indicating that the proportion of professionals was below the national average. Again, it is crucial to explore strategies to up-skill the workforce and build on this sector's competitive strengths as well as its interrelationship with the agriculture sector.

The rationale for taking the retail sector forward for further analysis is that the retail offer in conjunction with leisure activities are important in retaining as well as attracting people to live and work in the area. Wisbech has long been a retail centre that serves its rural catchment area, and the town is an important destination for comparison retail (clothes, shoes etc). The extent to which local residents' retail expenditure is retained in the town rather than being spent in other locations e.g. Peterborough, Kings Lynn and March, is relatively high compared to other market towns (FDC 2009). Despite Wisbech's retail sector suffering in the economic recession, FDC (2012) sets out strategies for new housing, employment and retail growth. These are all intended to uplift Wisbech, and in turn could further support the sector and underpin a high value-added growth scenario.

5. Growth scenarios for agriculture, food manufacturing and retail sectors in the Wisbech TTWA

Appendix C contains an estimate and projection of gross value added (GVA) of the agriculture, food-manufacturing and retail sectors in the Wisbech TTWA. GVA measures the contribution to the economy of individual producers, industries or sectors.

The geographical area of the Wisbech economy in this analysis is mainly the Wisbech Functional Area (WFA), one of the three segments of the Wisbech TTWA defined in AECOM (2011). This is an experimental projection, and thus should be interpreted as an indicative reference but not as absolutely predictable information.

Method

Table 1 sets out the estimated gross value added (GVA) in the agriculture, food-manufacturing and retail sectors in the Wisbech Function Area (WFA) from 2001 to 2010.

The estimation methodology employed a top-down approach drawing on macro-economic, labour economic, demographic and business statistics from the national to the super output area levels. Of those pieces of information, the base was drawn from the GVA by broad industrial sector for Cambridgeshire County.

Table 1 GVA estimate by subsector for WFA and by sector for CCC (£s million)

	WFA			Cambridgeshire CC		
	agriculture	food-manufacturing	retail	Agriculture, forestry & fishing	Production	Distribution; transport; accommodation & food
2001	13	43	32	171	1,570	1,609
2002	13	44	32	177	1,612	1,703
2003	14	41	34	180	1,536	1,909
2004	17	42	38	225	1,576	2,087
2005	13	42	40	162	1,587	2,042
2006	16	48	39	203	1,816	2,153
2007	16	52	38	194	1,985	2,215
2008	17	51	41	209	1,985	2,253
2009	18	52	43	215	2,034	2,068
2010	19	54	45	245	2,214	2,182

Note: The GVA is based on the current basic price employed in estimating sub-regional GVA in 2011 by ONS.

Source: For WFA, CCHPR analysis. For CCC, ONS.

Key findings

- In 2010 the agricultural GVA in the WFA was estimated at around £19 million – an increase by £6 million from 2001.
- The latest GVA for the food-manufacturing sector was £54 million, increasing by £11 million from 2001.
- The GVA in the retail sector was £45 million in 2010, which suggests a recovery from the nation-wide recession in 2009 and an increase from £32 million in 2001.

Growth scenarios

The next stage of the analysis projected an estimate of what the change in the GVA would be in the future for each sector under different macro-economic scenarios:

- Each sub-sectoral GVA projection is subject to the development of macro-economic fundamentals for the projection period.
- The latest provisional UK GDP growth in 2012 was only 0.2% (ONS), suggesting that the three sub-sectors in the WFA were unlikely to have drastically increased their output last year.
- For 2013 and onwards, the major research organisations forecast the UK GDP growth as summarised in Table 2. Overall, 2013 is forecasted to see a weak growth – all the forecasts are at 1% or below.
- 2014 is expected to show improvement, albeit not very strong – the forecasts range from 1.5% to 2.0%. Thereafter, all the forecasts are at or above 2.0%.
- Taking into account these forecasts and the past macro-economic data, we formulated three macro-economic scenarios (moderate, weak and robust) for our projections of the WFA economy (Table 3).
- The December 2013 forecast in the Office for Budget Responsibility economic and fiscal outlook shows that the UK economy has picked up more strongly in 2013 than was expected in the March forecast, suggesting that the robust economic growth scenario is more likely to be achieved.
- The growth rates after 2015 in the weak scenario took into account the average GDP growth rate over the decade to 2011 – the period which contained the recession around 2009.

Table 2 The UK GDP growth rate forecasts by selected organisations (%)

	OBR	IMF	OECD	EC	NIESR	BoE	OE
2013	0.6	1.0	0.9	0.9	0.7	0.9	0.9
2014	1.8	1.9	1.6	1.9	1.5	1.8	2.0
2015	2.3	2.6			2.1	2.0	2.5
2016	2.7	2.6			2.3		2.8

Source: Office for Budget Responsibility. *Economic and fiscal outlook*; March 2013, P.81.

Table 3 Three scenarios of the UK GDP growth rate for the WFA economy (%)

	moderate	weak	robust
2011*	1.1	1.1	1.1
2012*	0.2	0.2	0.2
2013	0.8	0.6	1.0
2014	1.8	1.5	2.0
2015	2.3	1.5	2.6
2016 & afterwards	2.6	1.5	2.8

Note: *published data by ONS.

To project the GVA of each of the agriculture, food manufacturing and retail sectors in the WFA under the three macro-economic scenarios above, three different strategies were envisaged, namely:

A baseline strategy: this assumes that the labour force and capital investment will change at the same pace as over the decade to 2010. It assumes that the pace of change in moving towards higher value production will be the same as over the decade to 2010. It assumes that there will be limited change in the average unit value.

A high value strategy: this assumes that the pace of change will be much greater. It assumes changes in the labour force, with an overall increase in the number of workers, an increase in the skills and knowledge of elementary workers, and an increase in managerial workers. It assumes that capital is invested in higher value products and that there is a change in the allocation of labour and capital inputs towards high value products. It assumes that 30% (in the mid-term) and 50% (in the long-term) of inputs will be allocated to products with 70% higher value than the current average unit value.

A mixed strategy: this assumes a slower increase in the labour force, skills base and number of managerial workers than in the high value strategy (but faster growth than in the baseline strategy). It assumes that 30% (in the mid-term) and 50% (in the long-term) of inputs will be allocated to products with 20% higher value than the current average unit value.

Each strategy (baseline, high, mixed) was analysed under the three macro-economic scenarios outlined above (moderate, weak and robust) to project the development of the GVA in agriculture, food manufacturing and retail for short, mid and long-term periods.

Projected change in the GVA of the agriculture sector

Table 4 presents nine alternative GVA projections according to the three strategies in each of the three macro-economic scenarios for every five years to 2030.

Table 4 Projections: GVA in Agricultural sector in WFA (£s million)

macro econ	Year	base	mixed	HV oriented
moderate	2010	19	19	19
	2015	18	19	21
	2020	22	24	28
	2025	26	29	36
	2030	31	35	45
weak	2010	19	19	19
	2015	18	18	20
	2020	20	21	24
	2025	22	24	29
	2030	25	27	34
robust	2010	19	19	19
	2015	18	19	21
	2020	23	24	29
	2025	27	30	39
	2030	33	37	50

Note: The GVA is based on the current basic price employed for the 2011 estimate by ONS.

Source: CCHPR analysis.

In the moderate macro-economic scenario, the baseline and mixed strategies fail to show an increase from the 2010 level, owing mainly to the restrained macro-economic forecast up to 2014. With the high value oriented strategy, however, the agricultural GVA is projected to marginally outperform the 2010 level in 2015. With the baseline strategy GVA will recover above the 2010 level in 2020 and rise to £31 million in 2030. The mixed and high value oriented strategies will increase GVA at £35 million and £45 million respectively in 2030.

In the weak macro-economic scenario, the projection with the mixed strategy appeared slightly below that with the baseline strategy in the moderate scenario. This suggests that achieving growth in a fragile macro-economic recovery would take considerable innovation.

In the robust macro-economic scenario, the baseline GVA is projected to be £23 million and £33 million in 2020 and 2030 respectively. Both levels are somewhat below the equivalents with the mixed strategy in the moderate macro-economic scenario. In other words, the agricultural GVA that could be achieved not by innovation but by a robust macro-economic growth could be less than the GVA that could be achieved with reasonable innovation in the moderate macro-economic scenario. So even if overall economic growth is very robust, it would be better to invest in higher value production.

Projected change in the GVA of the food manufacturing sector

Table 5 has nine alternative GVA projections according to the three strategies in each of the three macro-economic scenarios for every five years to 2030.

Table 5 Projections: GVA in Food-manufacturing sector in WFA (£s million)

macro econ	year	base	mixed	HV oriented
moderate	2010	54	54	54
	2015	52	52	53
	2020	59	60	62
	2025	67	70	72
	2030	76	80	84
weak	2010	54	54	54
	2015	51	51	52
	2020	55	56	57
	2025	60	61	63
	2030	65	67	69
robust	2010	54	54	54
	2015	52	53	54
	2020	60	62	64
	2025	70	72	76
	2030	81	85	89

Note & Source: As Table 4.

In the weak macro-economic scenario, even the high value oriented strategy fails to reach the baseline level that would be achieved in the moderate macro-economic scenario. In this case, the most innovative strategies will be required to minimise the negative impact of the unfavourable macro-economic fundamentals.

The moderate macro-economic scenario is projected to see a marginal decrease in the GVA in 2015. As shown in the agricultural projections, the good performance in 2010 and the somewhat fragile macro-economic environment expected up to 2014 is associated with the suppressed projection. In the mid-term projections (in 2020), all the strategies will experience an obvious increase – the GVA is projected to range from £59 million (baseline) to £62 million (high value oriented).

In the robust macro-economic scenario, the mixed strategy will obtain greater achievement than that with the high value oriented strategy in the moderate macro-economic scenario.

Projected change in the GVA of the retail sector

In the moderate macro-economic scenario, the GVA fails to show a rise in 2015, but it will increase to £52 million in 2020 and £71 million in 2030.

Table 6 Projections: GVA in Retail sector in WFA (£s million)

macro econ	moderate	weak	robust
2010	45	45	45
2015	44	43	44
2020	52	47	52
2025	61	52	62
2030	71	56	73

Note & Source: As Table 4.

The weak macro-economic scenario shows a marginal decrease in GVA in 2015. It sets out a mid-term recovery and is projected to reach £56 million in 2030.

In the robust macro-economic scenario, the GVA is expected to remain at the level in the moderate scenario up to 2020, and thereafter to show a positive increase from this level.

Summary

The GVA analysis shows that there is potential for strong growth in GVA in the agriculture and food manufacturing sectors. In the robust macro-economic scenario with a high value oriented growth strategy, by 2030 the combined GVA of the agri-food sector could be £139 million.

However, it shows that relying on strong overall macro-economic growth alone will not generate the GVA that the sectors have the potential to deliver. Businesses need to aim for the higher value strategy to achieve strong growth in GVA, particularly if the macro-economic environment remains weak and uncertain. This means innovating and developing business strategies that will increase the number of workers, increase the skills and knowledge of elementary workers and increase the managerial workforce. It means investing capital and labour in producing higher value products e.g. through technological innovation and economies of scale.

The analysis shows that the likely GVA contribution from the retail sector is relatively weaker than agriculture/horticulture and food manufacturing. In consultation with the project steering

group, the retail sector was not taken forward for specific stakeholder consultation, based on its weaker growth potential.

The sectors therefore taken forward for further analysis and stakeholder consultation were the agriculture and food manufacturing sectors. The interviews with businesses and other stakeholders looked at how agricultural and food manufacturing businesses in the Wisbech TTWA are trying to achieve the higher value production that will generate strong GVA in the local economy in the future.

In the analysis so far, the agriculture and the food manufacturing sectors have been considered separately. However, as they are inextricably linked parts of the same supply chain, the report hereafter considers them jointly, referring to them to as the agri-food sector. The next section first provides an overview of the global and national trends in the agri-food sector and then examines how businesses in the Wisbech TTWA are responding to those challenges.

6. Global and national trends in the agri-food sector

The agri-food sector is one of the most stable of sectors in the UK, particularly throughout the recession. Its continued competitiveness is an important part of the UK economic growth agenda. However, the sector also faces major challenges to which businesses need to respond in order to sustain growth and productivity (Deloitte 2011; DEFRA 2012, 2013a&b). These challenges include:

(i) Rising global demand and food prices

Over the last decade, global food prices rose twice as fast as inflation. Increasing global demand has continued to drive further food price increases and volatility. Nominal prices of the main global agricultural commodities are expected to continue on an upward trend to 2021 and are projected to average 10 to 30 per cent above those of the previous decade. Wheat prices, for instance, have witnessed huge volatility and this has coincided with diminished financial support from European Common Agricultural Policies (CAP). Removing the buffer which protected agricultural prices has thus contributed to further price volatility.

(ii) Growing food trade deficit

The dramatic increase in resource prices has resulted in food security concerns in the UK. The importance of continuing to focus on food independence as a means to reduce the UK food trade deficit has become more critical. In 2011, the UK produced 52% of the food it consumed, whereas in 1989 it produced 67%. Securing domestic supply by focusing on self-sufficiency would not only help stem the deficit but also support local producers and manufacturers in the sector.

(iii) Increased input costs

Pressures on agri-food businesses' profit margins are caused by price volatility but also by a continued increase in input costs, including oil prices and chemical inputs such as fertilisers/pesticides. Moreover, businesses are increasingly unable to pass input costs on to trade customers. This has resulted in higher costs of food production, driving all parts of the food chain to try to make cost savings and increase efficiency.

(iv) Intensified competition from emerging markets

The UK has lost its global market share in agri-food. This lost market share has occurred as world exports grew by 10% year on year. Other countries increasing their own share of global agri-food trade include Brazil, China, Indonesia, Thailand, the Russian Federation and Ukraine. These emerging economies have become the main source of global production growth and this trend is set to continue to 2021.

(v) Changing domestic consumer behaviour

The lasting downturn in real consumer spending in the UK and continued increase in the cost of food in real terms has driven significant shifts in UK patterns of consumption. Consumers are changing their spending habits to try to make savings based on affordability. Changing consumer consumption preferences are witnessed through greater discretionary spending, for instance, greater spending on simple luxury, e.g. branded beverages, and also through increased demand for convenience and healthier products. Options for healthy locally produced food products are also becoming more attractive to consumers.

(vi) Intensifying retail competition

Major structural changes are occurring throughout the food chain, driven by retailers protecting their margins and managing price volatility. The large numbers of growers, producers and food manufacturers means that competition is high and retailers are taking control of the food chain and demanding higher service levels from all parts of the agri-food sector. Increased vertical integration between retailers and suppliers as well as consolidation of different parts of the food chain is taking place globally, giving retailers greater control over strategic parts of the increasingly international distribution networks. The consequences of consolidation and cost savings include the disposal of some brands and production sites.

Retailers are also responding to changing consumer preferences by restructuring their store portfolio and concentrating on the fastest growing sectors in market, including convenience and on-line goods, as well as redefining the role of physical space to make stores relevant to changing shopper habits which again impacts on agri-food industries supplying brands which are discontinued. Competition is reduced as large businesses take over smaller ones.

(vii) Climate change and environmental sustainability

Set against a backdrop of climate change and concerns over food security, the pressures to reduce wastage and energy consumption at all points of the food chain have also grown considerably. Reducing waste has become an important driver of product and packaging innovations. Agri-businesses need to rethink ways to increase productivity in more sustainable ways so as to achieve greater energy efficiency. The challenge for the UK is to grow, manufacture, distribute and consume food sustainably.

7. Wisbech TTWA agri-food sector

In addition to quantifiable contributions to the local economy (noted in section 4), the agri-food sector is also more embedded within the economy than other sectors because of the diverse range of businesses it supports across the entire food chain. In the Wisbech TTWA, the agri-food sector supports a large number of farmers and producers growing arable crops and traditional vegetables, such as potatoes, onions and sugar beet, as well as ornamental plants. It also supports a large and diverse range of other businesses relating to areas of food, drink, manufacturing, storage and distribution, including hauliers, packers, wholesalers and merchants, food and drink manufacturing as well as financial, legal, construction and tourism enterprises. The majority of businesses are inter-related, also sourcing a high percentage of their produce from local farmers and growers. When induced impacts of spending by those employed in the sector are added to the indirect effects in other industries, the overall contribution to the local economy is significant.

The majority of businesses in the Wisbech TTWA are local, small and medium sized enterprises (SMEs), although national, leading agriculture suppliers, as well as multinational companies, including Princes and Del Monte canning production sites, are also present. Multinational companies, in particular, have the financial strength to invest and create employment opportunities as well as support existing supply chains. They also have the potential to attract a new generation of value-adding businesses to the local economy, although over-dependence on these large multinational employers is a risk if corporate decisions to divest occur.

In the next sections, the Wisbech TTWA's competitive strengths in the agri-food sector as well as the potential constraints to growth are summarised. This is followed by the different strategies that agri-food companies in the Wisbech TTWA are adopting to add value to their businesses and increase productivity. Direct testimonies as well as case studies are drawn from the stakeholder consultation.

8. Wisbech TTWA competitive strengths

The Wisbech TTWA has one of the most productive farmlands in England, consisting of rich fertile peat soils with a high proportion as grade 1 land:

“The quality of the land is the main thing. There is strong demand for what we grow. For potatoes this area is renowned for their keeping ability. There is a known brand name for our produce”. (Agriculture business)

One of the Wisbech TTWA’s key assets is its strategic location for food production, storage and logistics. This is a result of its position in the east of the county and its well-connected supply chain, with local food processors sourcing a high proportion of their produce from local growers and producers. Well-established, long term, loyal relationships and solid reputations have been built up across the food chain and with customers:

“We are in the middle of a lot of flower growers so it is a good place to be located. We use local growers as much as possible depending on what is in season”. (Horticulture business)

There are many related businesses in the supply chain locally which also provide necessary support for agri-food companies:

“What Wisbech offers to me is fantastic for my business as everything I want is here. When a machine broke I phoned the manufacturer abroad and it was going to take ages but I phoned a local and it was fixed the same day. All the supplies for business are here as it is a food manufacturing place”. (Agriculture business)

“This is a key centre for growing produce and all the support industries you need are here too. For machinery and chemical inputs, there are local companies to provide all the inputs needed on tap”. (Agriculture business)

“A lot of the business support for the agri-food sector is located in Wisbech. A national leading input supplier and advisor has its HQ here – they are a critical player”. (Agriculture expert)

Another key asset is its relatively low-cost base, including comparatively low labour costs and land costs which make the location competitive. Relatively affordable housing costs are another advantage to retain and attract the workforce required.

The farmers and growers interviewed also stressed the importance of having an easily available, well-organised supply of largely migrant labour for seasonal work:

“We use casual labour which is all migrants from Eastern Europe which we get without any recruitment problems from an agency. We have peaks in the need for labour, for example, September and October is the potato harvest so we need a seasonal labour force”. (Agriculture business)

“A key strength of the location is being able to pool labour locally, especially for the seasonal work, around half our season workers are Eastern European migrants living locally and half are British born locals who return each year”. (Horticulture business)

The ability to expand premises and the support given through the FDC planning department was equally stressed by stakeholders:

“We were initially located in Long Sutton but we made a decision to relocate to Wisbech seven years ago rather than reinvest in the original site. The considerable support we received from FDC, particularly quickening up the planning procedures, made the whole process easier and convinced us go through with the relocation. Now we have plans to expand our premises further”. (Horticulture business)

9. Wisbech TTWA constraints on growth

Interviewees said that some people perceive Wisbech TTWA to be in a relatively remote location. The stakeholders interviewed suggested that this perception of the area is held by both outsiders and those within the area. The quality of the living and working environment was also argued to act as a deterrent for incoming professionals. The town was perceived by the majority interviewed to be in need of investment with insufficient social infrastructure such as restaurants and cafes to attract higher skilled and professional workers.

A number of concerns raised related to the labour supply issues. Farmers and growers in particular mentioned a shortage of skills, particularly the difficulties in recruiting employees with technical skills on the operations side of their business:

“The job becomes more technical every year. For example, all the machines are computerised. But the average age of employees is 50 or over. We need local technical knowledge to increase and support in this would be useful. If we could manage to employ someone with the IT skills we need it would be useful. Agriculture teaching has to include IT and technology. We desperately need skilled labour for these machines. For example, I have been trying to buy a sprayer for £240,000. But we need a trained man to use it. Someone with the technical knowledge to use the satellite control etc. There is a desperate national shortage of trained machine operatives”. (Agriculture business)

Difficulties were also raised in relation to encouraging young people into the profession. The workforce, particularly in farming, is ageing. There is a problem with the image of the agriculture and food manufacturing sectors. The sectors have struggled to attract good new people and it is not seen as a career choice as levels of progression and formal qualifications are low compared to other sectors:

“For agriculture there is a stigma in education, even though food production is the biggest manufacturing industry in the UK. But it is not seen as attractive to young people”. (Agriculture business)

“The horticulture sector has difficulties in encouraging young people into the profession. We calculated in ten years’ time fifty per cent of our workforce will be over 50 years old and we need to make sure skills are transferred to younger people. There is a skills shortage particularly for technical skills on the operation side. We need to raise the perception of the sector with regards to what jobs can be offered – it’s a branding image problem”. (Horticulture business)

This problem is compounded by the fact that there is a local perception among young people in Wisbech that employment opportunities are lacking in the TTWA and out-migration of post 16 school leavers is considerable. The stakeholder interviews reiterated this point.

A reliance on migrant workers, particularly for seasonal work, is common. Interviewees said that they would struggle to manage their businesses without access to such labour. This

could raise questions about the impact of migrants returning home, causing difficulties for the future growth of this sector.

The Wisbech TTWA has a high proportion of long established businesses and a low birth rate of new enterprises which may indicate a low 'business churn'. For some small scale, low value arable farmers, simply making a living is enough, there is not a focus on innovation and expansion and they often employ conservative financial strategies e.g. they use savings to purchase machinery. Many farms have remained in the same family for several generations:

“A lot of the wheat farmers in the Wisbech area are benefiting from government subsidy system pricing and earning a relatively decent income and most own their land holdings – there is little incentive to change what they produce. The more progressive farmers are those that rent and spread their operations across different holdings through joint ventures. They have a greater incentive to perform better and increase outputs and so drive the sector”. (Agriculture expert)

Over-reliance on large food manufacturers as key employers is also a cause for concern. There is a potential threat from multinational companies disinvesting and relocating elsewhere, although it was difficult to engage with these companies throughout the consultation process and obtain sensitive information on investment/relocation plans:

“Food production sites if 20-25 years old need large scale up-front costs to rebuild or refurbish. These decisions depend on HQs outside the area and outside local control”. (Agriculture expert)

Many considered the business network and underlying support for the agri-food sector to be weak in the Wisbech TTWA. There was a lack of knowledge of national, regional and local initiatives that have direct relevance to agri-food businesses in the area. For instance, there was little awareness of the announcement of the Eastern England Agri-Tech Growth Initiative:

“The business network here is not strong. Support and understanding of agri-food business needs is poor e.g. from the Chamber of Trade. The weakness is probably because Wisbech is on the edge of the county and out on a limb. To improve the networking takes hard graft with local leadership and resources”. (Agriculture expert)

“Companies need to be business savvy and change their mind set. There is no clear body that represents them. We need to join forces to improve the business connection process” (Agriculture expert)

Concerns were also raised in relation to inadequate infrastructure, such as poor transport links within the district and poor connectivity to neighbouring areas. Longer transit times, particularly on local road networks, affect business logistics. Poor infrastructure, however, impacts on companies differently; food production companies moving large and high bulk produce, where the costs of transport are significant, were more affected compared to those that distribute higher value, smaller volume orders from depot to depot. Poor accessibility of

jobs by public transport, as well as relatively high levels of traffic congestion on key routes was also argued to affect business productivity:

“There are poor transport links from Boston, Wisbech and Ely. If it wasn’t for the soil you would not choose to be here. It needs better roads. The east-west road links across the country are poor”. (Agriculture business)

“The most critical constraint is the A47 and its links to the A1 and A14. This needs to be resolved. Government’s announcement to improve the A16 around Spalding will impact on Wisbech”. (Agriculture expert)

There is a potential but real threat from the growth of neighbouring agri-food clusters e.g. the food cluster around Spalding and also around the Norwich research park that have planned infrastructure investment. They may thus have potentially stronger opportunities to benefit from different government funding streams, for instance, the Eastern England Agri-Tech Growth initiative:

“There may not be enough of a critical mass in Wisbech to compete with these centres. We do not want a zero sum game where they are all competing, instead we need to make sure Wisbech is part of the Regional Growth Fund initiative and complements neighbouring clusters. We need much more cooperation and understanding”. (Agriculture expert)

10. Wider government initiatives

Although constraints to growth exist in the Wisbech TTWA, they need considering in the context of wider initiatives and changes. The challenges faced in the Wisbech TTWA are also issues elsewhere that are being addressed nationally and regionally. The growth projections in section 5 do not take account of changing government initiatives.

In July this year it was announced that the Government will provide £3.2 million of funding to support the development of the agri-tech industry in Peterborough, Cambridgeshire and Norfolk. The Eastern England Agri-Tech Growth Initiative¹ will receive the funding from the Government's Regional Growth Fund (RGF) following a bid submitted by the Greater Cambridge Greater Peterborough Enterprise Partnership (LEP), in conjunction with New Anglia LEP. The initiative will bring together leading agriculture, research, science and technology assets in the East of England with the aim of strengthening a nationally significant new cluster that brings a global reach and impetus to the emerging UK agri-tech sector.

The initiative aims to boost growth by:

- Supporting the development, application and commercialisation of new technology in the food and agriculture industry, through new market and supply chain development.
- Enabling essential skills development.
- Establishing a new cluster that puts the UK at the forefront of global challenges facing the food and agriculture sector.
- Providing loans for local SMEs in specialist food-related sectors and industries.
- Creating innovation support for micro-enterprises that are currently unable to access support via existing schemes, such as the Growth Accelerator.
- Reviewing opportunities to create a private sector network for the agri-tech cluster in the East of England to help broker investments.

The Wisbech TTWA must be connected to and embedded within this new initiative. Few stakeholders consulted during the research were aware of it:

“It is important that Wisbech’s role in the Fens is raised up and on par with other neighbouring areas. It must not see itself as competing with other agri-food centres, instead it needs to be part of it. A case needs to be made to see how the area fits into the RGF initiative through a concerted effort and collective voice”. (Agriculture expert)

The national Agricultural Technologies Strategy (DEFRA, 2013b) sets out a range of key actions, including:

- A £90 million government investment in world class Centres for Agricultural Innovation with additional investment from industry. The centres will support the wide-scale adoption of innovation and technology across key sectors, technologies

¹ <http://www.yourlocalenterprisepartnership.co.uk/3-2-million-funding-for-agri-tech/>

and skills in the food and farming supply chain. This includes up to £10 million for a Centre for Agricultural Informatics and Metrics of Sustainability which will use data from farms, laboratories and retailers to drive innovation.

- Creating a £70 million Agri-Tech Catalyst to help new agricultural technologies bridge the so called 'valley of death' between the lab and the marketplace. Co-funded with industry, the catalyst will specifically support small and medium sized enterprises. The investment includes £10 million to support the transfer of technology and new products to developing countries.
- The creation of an industry Leadership Council to unify the agriculture technology sector and make the UK more internationally competitive.
- The recruitment of a new UKTI agri-tech team to boost exports and overseas investment in the UK's agricultural technologies.

Businesses need also to be made aware of changes in government legislation which could impact on their business operations. For instance, the Seasonal Agricultural Workers Scheme (SAWS) has allowed fruit and vegetable growers to employ migrant workers from Bulgaria and Romania as seasonal workers for up to six months at a time but closed at the end of 2013 (Home Office 2013). There had been an annual quota of 21,250 SAWS participants. From 1 January 2014, when the transitional labour market controls on Bulgarian and Romanian (EU2) nationals were lifted, growers have unrestricted access to EU2 workers (ibid). Since the controls on the EU8 (the member states that acceded to the European Union in 2004) workers were lifted, those workers have continued to form the core of the seasonal agricultural workforce. At present, UK growers recruit about one third of their seasonal workers from the EU2, and about one half from the EU8. The impact of the changes is uncertain but the government is confident that labour supply will still be sufficient (ibid).

11. Wisbech TTWA agri-food business strategies - building on strengths and responding to challenges

The need to reduce unit costs, increase production and counteract falling output prices means that agri-food businesses in the Wisbech TTWA must continually pursue new opportunities in order to maintain and increase productivity. At present, many businesses have been restraining from investing due to economic uncertainty. Confidence in the sector has been affected by the recession. As agriculture experts noted in interviews, investments at the moment are relatively negligible and little capital expenditure is occurring.

Across the supply chain, companies now need to make strategic decisions about where to drive profitable growth (Deloitte 2011). Embracing change means they are more likely to stay in business. It is not sufficient to sustain growth but also new capabilities are required e.g., through extending their core business; identifying new market segments; investing in longer term growth opportunities through new value creation; developing innovations to serve these opportunities as well as a developing a deeper understanding of customers' changing demands (ibid). Continuing to identify growth opportunities within their current business operations as well as investing in new activities is fundamental to growth (ibid).

The research found that in the Wisbech TTWA agriculture and horticulture are very varied. Some growers who were interviewed had no growth, innovation or diversification strategies but others had a focus on efficiency, increasing value, innovation and diversification. Some of the processing companies in the Wisbech TTWA are small scale processors of high value produce, for example, fruit processed into juice. The interviews found that this tends to be for a relatively local market with high distribution costs and a focus on local provenance in marketing. Interviews with food manufacturing companies in the Wisbech TTWA found that they face challenges with regard to whether to invest in and build a new factory and/or relocate, for instance, which requires significant capital expenditure costs.

Interviews with stakeholders suggest that multinational companies work differently, however, by taking a longer term perspective. They therefore are prepared to make massive commitments in investing in new plants but at the same time, this can entail cutting the workforce as they divest and move out of the older inefficient facilities. There is a risk that comes with reliance on these large scale employers in the Wisbech TTWA. The corporate decisions and responsibilities change in response to consumer demand and other global factors over which the local area has little control.

The agri-food sector does, however, have a strong track record of being progressive and adaptable, with the development of new products and processes reflecting high levels of innovation (DEFRA 2012, 2013a&b). The interviews with stakeholders in the Wisbech TTWA found that businesses across the food chain have responded to an increasingly complex business environment, through investing in new technology, processing and product development, addressing skill shortages as well as new marketing strategies so that they add value and sustain growth.

The different business strategies are classified below, drawing on direct testimonies from interviews and case study examples as supporting evidence.

(i) Adopting innovation and new technologies

To manage price volatility and protect margins, progressive agri-food businesses are rethinking ways to secure investment in R&D and technology in order to improve productivity through reducing operational costs and delivering better operational efficiencies. Improving productivity through innovations also makes the sector more attractive to investors therefore creating an upward growth cycle (Deloitte 2011).

There are different forms of technological investment. Investing in product technology capabilities allows the business to move up-value by creating, designing and commercialising new products including both goods and services thus allowing the businesses to increase competitiveness in existing and new markets². Yet there is a risk of product failure and it can require costly development in R&D in the new brand and marketing capabilities (Deloitte 2011).

Reviewing the national changes in the agri-food sector, Deloitte (2011) found that investing in process technology capabilities entails mastering the latest technology for low cost high quality product replication. Adopting technology that is higher up the value-added ladder entails upgrading the size and technology used in the business to enhance productivity. Businesses, in effect, reposition themselves from a low-end, low-tech food grower/producer or manufacturer to a higher value, highly sophisticated grower/producer or manufacturer (ibid). This often requires, however, constant investment of resources into existing and new technologies in order to maintain the businesses' competitive capabilities and high levels of productivity, particularly in face of rising input costs.

The agri-food sector has become a highly competitive industry with technological innovations to increase productivity as well as diversifying products and services being crucial to meet the increasingly sophisticated customer demand.

In the Wisbech TTWA, interviews with food producers and growers found that investing in precision farming techniques and adopting new process technological innovations includes, for instance, investing in the latest innovations in chemical inputs such as fertilisers and pesticides, and plant breeding capabilities. Farming of high value fruit, in particular, requires innovation e.g. in plant varieties, small growers have more variety of fruit crop types to cover the season but all growers of high value fruit focus on extending the season:

“We have also focused R&D on ways to prolong the growing season through introducing autumn bedding plants, selling Christmas trees, mail ordering and extending their packaging facilities. This also offers longer term employment and greater job security to our employees”. (Horticulture business)

“We trial new varieties in small quantities of about 500 plants and see if I can extend the season of strawberries as they are the main crop. We look at what the big producers are growing 2 or 3 weeks earlier in the season and try them to see if they will work in the organic system”. (Agriculture business)

² Outside the US, the UK has witnessed the highest number of new product launches between 2005 and 2011 and is the global leader in encouraging healthier products (Deloitte 2011).

Drawing on leading input suppliers who offer advice and support is critical for agriculture producers and growers in the TTWA to stay competitive.

Case study - large high value input suppliers

The company is a wholly owned family business with headquarters in Wisbech since the 1930s. It has grown to be one of the leading national agricultural and horticulture input advice and supply companies. The company has a long history of carrying out research trials and technical investigations, with field trials being carried out for farmers and growers across different soil types. They have seven regional technology centres which form hubs for investigative work, one of which is near Wisbech. They also work with all the major agro-chemical research and development manufacturers investing capital and resources into trials and new projects. The company has made recent breakthroughs e.g. in the management for oilseed rape, resistant disease fungicide management, cereal variety evaluation and blackgrass control. As the industry becomes increasingly scientific and technical, the company needs to keep innovative in order to deliver practical farming solutions to the farmers and growers so they maintain their competitiveness as well.

The stakeholder consultation found that there is also a constant focus on upgrading agricultural equipment and growing facilities, including investing in state-of-the-art equipment and facilities.

Case study - large scale high value grower – horticulture produce

The independent company was founded fifty years ago and relocated to the Wisbech area from Long Sutton in 2006, with the site covering 14 acres. The company specialises in the production of quality young plants, having over 2000 varieties of plants to satisfy customers' needs and stockholdings throughout the season. It constantly works with plant breeders to develop new varieties. When the company relocated, it invested in state-of-the-art glass houses which have the latest computer controls and equipment including underground and above ground heating, lighting, shades, sprinklers and automatic ventilation to provide optimal growing conditions and increase efficiency and productivity.

Farmers and growers interviewed also look to the larger national growers for information about recent innovation, but also to international developments:

“We look abroad for innovations. Not to Europe. Europe is not innovative because of the level of innovation. We look to South America and America, especially Brazil as the world’s biggest wheat producer. Where companies drive innovation it is focused there. There is no market for innovation in the EU. Technological advances are hindered by regulation”. (Agriculture business)

It can be difficult, however, for local farmers and growers in the TTWA to keep up with capital investment:

“The orchards in Wisbech are very modern. Some companies won’t innovate and they will fall by the wayside and there is nothing we can do. Most companies in the area do want to innovate but don’t have the capital to do that rapidly. It is a continual evolution but this is difficult to maintain as it requires continual investment. It is not a quick return. If you invest you have to wait 7 years before you get a return. So there are orchards that were very modern ten years ago but they can’t afford to invest again yet”. (Agriculture business)

For the agri-food manufacturers interviewed, innovations in packaging, processing, storage, and distribution are critical so that products are delivered to retailers and households more efficiently:

“We are under constant pressure to reduce wastage and we have demands on us to deliver the freshest and most visually appealing products to customers. This drives the need to invest in R&D related to transport and handling, as well as packaging and graphics”. (Food processing business)

Adding value to food manufacturers’ businesses entails R&D in both product and process technology capabilities. Examples were given in interviews of extending the company’s production range to create premium products which require innovation in both processing and packaging. It also requires an input of labour with additional technical skills to create these newly launched products which often consist of a multitude of ingredients.

(ii) Achieving economies of scale

Growers interviewed said that they look for economies of scale and ways to increase yields and efficiency. It is a highly technical and professionalised industry. Smaller growers often join cooperatives to market their produce.

Modern large scale low value arable farming is capital but not labour intensive. Amongst those interviewed there is a focus on increasing efficiency, reducing labour inputs, but not a focus on increasing value through changing crop types. Large scale arable farming increasingly replaces labour with capital in the form of machinery which is increasingly technical. The aim is to increase economies of scale, for example, through using co-ops for marketing and storage, increasing efficiency and yields through technological and seed innovation and new methods.

Some farmers interviewed look to expand the use of contract arrangements with nearby farms. This often occurs where the neighbouring farmer wants to step back from the physical work of farming e.g. on retirement. This allows the contract farmer to farm on a bigger scale and to achieve economies of scale in machinery and labour:

“I have land and two neighbouring farms work with me for a fee. They provide the labour and the machinery and one does the arable and one does the fruit. We pay for the inputs on a shared basis and then any profit we share on an agreed basis”. (Agriculture business)

Case study - large scale low value grower - large arable farm part of national group

This 1500 acre farm which is part of a national group grows winter wheat and rape, sugar beet, onions and potatoes. It employs eight full time staff, one of whom is on an apprenticeship scheme, and an administrator. There is use of a lot of seasonal migrant labour through an agency. The farm focuses on increasing efficiency and yields through technological innovation and achieving economies of scale. The farm looks to developments overseas for the latest innovations e.g. to Brazil as the world's biggest wheat producer, although they also gather knowledge from local trade or levy bodies such the Agriculture and Horticulture Development Board.

The interviews found that food manufacturers equally are concerned with managing their distribution networks and achieving greater vertical integration and economies of scale.

Case study - large international food and drink group – low value canning production

An international food and drink group specialising in sourcing quality products and ingredients from around the world. They manufacture food and drink products across state-of-the-art manufacturing sites and deliver products to retailers, wholesalers, foodservices and industrial customers through an international supply chain, employing over 6,000 people and operating 14 major food and drink production sites. The company completed acquisition of a competitor's canning operations in 2011 at Wisbech and Long Sutton which collectively employs over 1,000 employees. They are committed to investing in their newly acquired factories and sustaining their supply chains in general to achieve greater vertical integration and economies of scale. The acquisition of the Wisbech site significantly expands the company's portfolio of branded and customer own label products in the canned foods sector to respond to consumer demand.

(iii) Targeting customers to develop product innovations

Agri-food companies need to anticipate and meet new consumer preferences so that they retain and or increase their share in the segment of the market that is growing e.g. convenience and healthier products. Businesses have to rethink their brand and product ranges, which often entails 'value-engineering' their existing products (Deloitte 2011). This can entail introducing low cost products, less packaging, as well as focusing on higher end premium items to cater for smaller but affluent groups of customers. In this way, profit margins are protected and sales are secured.

To align business understanding of their product portfolio with consumer preferences, better planning and forecasting tools need to be developed, such as investing in data analytics capabilities which match products and customers. The interviews found that new products include food growers and producers focusing on organic produce or new exotic ingredients. Food manufacturers interviewed are equally adding product value in response to changing consumer preference through, for instance, focusing production on prepared fruit salads.

Case study - large international food and drink group – low value canning production

An international food and drink group which provides a variety of goods and services including sales, ripening, sorting, repacking, fresh cut processing, processed foods and delivery globally. The Wisbech food production and distribution centre was purchased in 2002; over 200 are employed on-site. The site focuses on preparation of fruit salads, with this aspect of the business expanding in response to growing consumer demand, therefore investment is set to continue. Other distribution centres have been less fortunate, for instance in Lincolnshire, two centres have closed down which concentrated on packaging ready-to-eat whole fruit. The company is under pressure to respond to both changing consumer demand as well as the need to consolidate its supply chain refrigerated delivery system in order to make cost savings and improve company efficiencies. Preparation of fruit salads requires more technical knowledge so employees are being retrained and up-skilled, with training courses occur in-house through apprenticeships.

(iv) Moving the business further up the supply chain

There is scope for businesses to move up the supply chain in order to increase profit margins. Some farmers and growers who were interviewed add value to their output and receive greater income through primary food processing. The interviews found that food manufacturers and secondary processors equally add value through introducing food wholesaling and distribution to their operations:

“We are all looking at ways to add value to what we do, either directly or indirectly. We are looking to sell onions via a pack house to Sainsburys who are looking for innovation and different pack sizes. For our potatoes we are looking at developing our own baker line of ready to bake in packets to increase the value”. (Agriculture business)

However, the interviews also found that not all producers will consider expansion into other parts of the supply chain as it requires particular skills:

“I am a member of a produce organisation and we did have a cooperative venture for packaging. We thought about processing but we decided to leave it to people who know about it. There is a balance between shortening the supply chain and having the skills to do it properly”. (Agriculture business)

Opportunities to sell directly to the public can be explored in order to increase income as well as break the link with retailers' increased control over all aspects of the food chain. Setting up local food fairs, farmer markets as well as farm shops is one way farmers can pursue this route:

“We attend farmers markets in London. This is where the money is as they are willing to pay the premium for organic and there is big demand for organic as they are attuned to health”. (Agriculture business)

Also many innovative food growers and producers are focusing on direct internet selling, marketing and mail order as well as home delivery. To develop these new business opportunities, advice and support on how to enhance their brand-marketing strategies is critical, particularly for SMEs. The establishment of farmer cooperatives can assist the process.

Case study - small scale high value grower - soft and top fruit organics

This Wisbech smallholding grows organic soft and top fruit with Soil Association accreditation. There is not a sufficient market for organic soft fruit locally as it commands a premium price, so the produce is sold at farmer's markets in London. Excess fruit is processed into jam and jelly as a cottage industry and sold alongside the fruit. There is constant innovation in trials of plant varieties to try and extend the growing season. The smallholder looks to the large scale commercial growers who farm soft fruit under poly-tunnels for new plant varieties to trial within the organic system.

(v) Looking for security in the supply chain

Some of the food producers and growers interviewed have focused on securing purchasing deals with a sole regular large scale buyer:

"All the wheat goes to Bernard Matthews. All the sugar beet goes to British Sugar so there is a readymade market for the crops. We are completely self-contained on labour. We are not interested in increasing value, just want an easy life". (Agriculture business)

Both high value fruit producers and low value crop growers interviewed often use co-operatives to market their produce. Co-ops then market the produce on in bulk to large buyers:

"We buy grain from farmer members and sell it on their behalf and try to maximise the return. We buy from hundreds of farmers and sell to fewer customers". (Agriculture business)

Some growers who were interviewed supply to a diverse range of buyers to minimise risk:

"We supply 40 Waitrose stores but if they ever pulled the plug we would lose 40 customers and it is a risk. And there are about 30 National Trust properties. So we had to build the small independents so if you lose a customer you lose one not 40". (Food processing business)

Case study - low value arable farmer-owned co-operative for storage, marketing and distribution

This farmer-owned co-operative markets and stores grain on a large scale for around 1,200 farmers. They act as an intermediary for farmers and food manufacturers to achieve economies of scale in storage and marketing and provide market information to farmers. Investment costs are high and several million pounds has recently been invested in storage facilities at a Wisbech site.

Case study - high value fruit cooperative for storage, marketing and distribution

This co-op manages the fruit crop, mainly apples, for the growers post-harvest, which includes being responsible for storage, transport and marketing to enable economies of scale. Modern orchards focus on economies of scale, efficiencies and higher yields through innovation in planting and technology all of which can require high capital investment with relatively slow returns. The co-op keeps growers up to date with innovation in technologies and planting, looking both to developments overseas and to UK organisations such as the Agriculture and Horticulture Development Board.

(vi) Local provenance and reducing import penetration

The growing concerns over food security and the need to reduce the UK's food trade deficit represents an opportunity for the agri-food sector to continue to grow and safeguard food production. Focusing on self-sufficiency and locally known provenances not only helps to mitigate pressure on business margins but also supports local producers and manufacturers. Food localism and encouraging local food networks to reduce food miles is therefore a growing trend for businesses to capitalise upon. Both flowers and fruit are labour intensive and the interviews found that there tends to be a focus on local (or British) provenance in marketing:

"Dutch flower growers import but it has not affected us. People want local and they want British and this provenance is important". (Horticulture business)

Case study – large international food and drink group – low value canning production in Wisbech TTWA

As a business, they are committed to using British ingredients where possible and to continuing to foster long-term partnerships with their suppliers. They reconfirmed their support for UK farmers by committing to buy more than 40,000 tonnes of British-grown fruit and vegetables during the coming year. The company has also signed new deals with British growers of potatoes, peas, carrots, rhubarb and beetroot, with the fruit and vegetables to be processed at the business' Wisbech and Long Sutton-based production sites for use in branded and customer own-brand canned food.

Case study - small scale high value food processor - fruit growing and processing into juice

A Wisbech area apple juice processor started out making juice as a hobby in his back garden. When the first batch of juice sold rapidly, it began to expand as a fully-fledged business. Eventually relocating to the Wisbech area in order to be near high quality apple growers, the business now occupies a four acre site, half growing apples and half including an office, 500 tonnes of cold storage, a large barn and a production room. The juice is made using only local apples and is marketed for its local provenance. The business benefits from good access to markets with high disposable income such as Cambridge.

“We only buy in from other Cambridgeshire growers so we support local businesses. It states on the label that the apples are grown and pressed in Cambridgeshire”.

(vii) Diversifying into new activities

A number of strategies can be pursued to diversify agri-food businesses in order to add value to the business, increase incomes and sustain growth. With regard to farmers and producers, these options include for instance, renting out buildings and service provisions, setting up shops, catering and accommodation facilities as well as developing tourism activities. Farmers and employees, in effect, supplement their income as well as find employment alternatives in-situ through these means:

“We constantly focus on ways to add value and diversify into new business activities, including establishing a “cash and carry” permanent outlet for customers to directly choose plants. This has created new jobs as well”. (Food processing business)

*“The livery income helped the farm through hard times in the winter months”.
(Agriculture business)*

There is evidence in the stakeholder interviews of diversification into small side businesses in addition to the main activity of farming. This often stems from a personal interest and is used as an income supplement, often linking to leisure and local tourism:

“We had a large garden with about 3 acres of apples. A friend who worked in an orchard used to take them to make juice. I used to think that one day we would do that. At first we did it as a hobby..... At the high profile end we supply Waitrose, the National Trust and Hilton Hotel”. (Food processing business)

Case study - diversification from farming - low value farm with diversification into environmental schemes and local tourism

This farm has 313 acres rented from CCC farms, mainly growing arable crops. Some land is under different environmental schemes promoting good practices for wildlife and the maintenance of ancient orchards which are no longer commercially viable. The income from the environmental schemes is important for the farm's viability. The farm promotes retention of traditional apple varieties with 250 varieties of apples local to the East of England and holds 'apple days' for visitors. The farm also has a side business providing tree surgery, fencing, ground work and maintenance.

This form of pluri-activity and focusing on multi-outputs is a growing trend in the farming industry as means to derive multiple incomes within a farm household. Changes in cultural as well as business mind-sets are, however, needed. There are a number of pioneering businesses in the Wisbech TTWA which have repositioned themselves to sustain growth through these means.

Case study - diversification from farming - low value farm with high value diversification into equine

The tenant of this Cambridgeshire County Council arable farm of 270 acres converted an outbuilding into stabling for her horse. After requests from local people looking to stable their own horse, she converted other buildings and began running a small livery business. This expanded rapidly and she also trained as a riding instructor. As the business grew she successfully applied for grant funding to develop the business into a state of the art equine centre. The centre covers 20 acres and includes an all weather arena, floodlit to Olympic standard, stabling for 34 horses, and a café and a shop. The Fenland Equestrian Centre provides an income supplement to the farm and local employment and is an outreach centre providing training for the College of West Anglia.

(i) Skills, training and opportunities for new employees

As the industry becomes more sophisticated and traditional labour-intensive farming work declines, the demand for higher level and technical skills are needed, for instance, in mechanisation, quality control, ICT and production science as well as higher levels of management skills able to run increasingly large and complex business operations.

For farmers without their own land, the interviews found that CCC farm tenancy opportunities are important:

"There are limited opportunities for young people to get into the industry. Cambridgeshire County Council is important in providing some of the starter units for entrants into agriculture. So they are able to get on the first rung of the ladder by being able to rent land and be tenants on a CCC farm. The CCC farm estate is the

largest in the country and important for giving people a start in the industry”.
(Agriculture business)

The majority of businesses interviewed are also aware of the need for training, upskilling and bringing young people into the industry:

“The skill level needed is much higher than when I started out 50 years ago when we still had a few horses on the farm. But we are addressing it as an industry. For example the fruit farm has two lads on apprenticeships on day release on a formal scheme”. (Agriculture business)

There are positive examples of innovative companies that have addressed the skills issues that they faced directly, as the case study below highlights.

Case study – high value horticulture grower

The company employs twelve highly qualified growers and a hundred full time staff. In the high season, 200 are employed drawing on seasonal labour. A skills issue exists with respect to attracting young people into the profession as well as addressing skills shortages, particularly on the technical, operative side. The company took the initiative to establish a horticulture skills centre using Growing Places Funds secured through the LEP. The loan of £50,000 from the LEP needs to be repaid whilst the grant monies of £150,000 from FDC does not. The company also put an additional £100,000 of its own money into the initiative. The centre currently offers apprenticeship training; the company will receive five apprenticeships and another six will be trained for other related companies. There are opportunities to expand this initiative so that it becomes a local training hub for the Fens.

In comparison, the research found that the skills gap in the food processing industry was relatively low, as the sector is relatively low skilled. The desire to create higher skilled jobs often means reduced levels of employment. For multinational food producers with low value canning sites in the Wisbech TTWA, in-house training and apprenticeships are offered:

“We are committed to investing in employee skills, launching a range of training apprenticeship schemes in-house, which also includes a paid internship scheme and extension of our on-going graduate training scheme which Wisbech employees can benefit from so that they can update their skills as required”. (Food processing business)

For other agri-food companies who recruit from a national labour pool, the availability of highly skilled staff in the Wisbech TTWA is less of an issue.

Case study – large high value input supplier

The company employs 300 across 26 depots nationally, of which 30 staff are specifically in its HQ in Wisbech. Half of its total employees work in customer services and agronomic relationships. Training is carried out in-house as the industry is highly skilled, with relatively unique technical and scientific specialisms required. The company recruits from a strong and growing national labour pool, particularly of young professionals who perceive agri-tech sector to be a highly respected profession. There has been no issue recruiting locally, although the higher earning professionals working in the HQ do not necessarily live locally.

Summary

The Wisbech TTWA faces certain challenges in achieving growth in the agri-food sector. The area currently has a concentration of low skilled, low value employment. There are weaknesses in the local infrastructure connecting the TTWA to the rest of the country. However, there are numerous opportunities both to grow what is already there economically and to forge new links that will develop sectors in different ways. The evidence above shows that there are already numerous business strategies being employed to respond to challenges and seek growth. These are mainly focused on innovation, economies of scale, moving up the supply chain, diversification and skills and training.

Some businesses within the sectors are not interested in growth, expansion or innovation. However, there is a lot of innovation so for those who are seeking it, better links could be forged with existing and new centres for innovation and developments in science and manufacturing. This knowledge could be made available to those businesses which are interested through existing channels used to access knowledge such as the Agriculture and Horticulture Development Board.

Innovation varies so support must be targeted where it is wanted and where it can have the greatest multiplier effect e.g. through producer organisations and co-ops. Support could be targeted at increasing economies of scale, at developing mechanisms for knowledge sharing, and for nurturing local investment in capital expenditure on upgrading, mechanisation and technological innovation and investment.

Further support could be provided to encourage growth in existing sectors. For example, the findings show that local provenance is important in marketing produce to increase value for growers and processors but that marketing experience is limited. Support can be provided for diversification of low value agricultural producers into higher value areas such as packaging, processing and marketing with business advice, networks and information about grant funding.

There is a need to continue to develop work with young people to encourage them into the industry and highlight career paths and training opportunities locally. If local businesses are to develop increasingly mechanised, IT based and technologically focused processes then these skills will need to be nurtured.

It is possible that large employers e.g. in the food processing industry could relocate into the area and provide further low skilled employment in large numbers. However, many areas compete for such development and decisions about location are often made in response to global and national factors in which local area specifics do not always play the largest role. There is also the risk of disinvestment that comes with large scale employment from one or two employers as company priorities change in response to consumer demand and other factors over which the area has little control.

There would therefore be benefits in supporting small business growth. The area has entrepreneurship in both agriculture and food processing that could be strengthened by central support in the form of business advice and networks and seed funding. For example, it is possible to develop links to the Cambridge knowledge economy with the aim of promoting processing and manufacturing which the area already has a labour force with the skills to develop in this field, with the selling points of relatively cheap labour and lower housing and land costs.

The next section sets out the different recommendations based on this research to build on the strengths of the agri-food sector in the Wisbech TTWA and to overcome the constraints on growth. Without support it is likely that only the baseline or mixed GVA scenarios will be achieved, but with support the higher value growth scenarios are more likely to be attained.

12. Recommendations

The research shows that there is potential for growth in the agri-food sector in the Wisbech TTWA. However, relying on strong overall macro-economic growth alone will not generate the added value to the local economy that the sector has the potential to deliver. Businesses need to further develop high value oriented strategies, particularly if the macro-economic environment remains weak. This means innovating and developing business strategies that will increase skills and invest capital and labour in producing higher value products e.g. through technological innovation and economies of scale.

Capitalising on the fact that agri-food is already Wisbech's dominant sector is recommended, focusing on opportunities to scale-up its economic potential, which can be completed in a shorter timescale than creating the environment for developing new specialisms in emerging sectors where it is currently underrepresented, such as green tech, renewable energy and marine engineering. However, FDC are optimistic that a longer term strategy delivered through the Fenland Enterprising in Education and the LEP Skills Service projects to improve higher end skills and utilise assets such as the port could derive economic gains, albeit smaller in scale to that of the agri-food sector. Although this was not explored through the research, this would reduce the town's vulnerability to dependence on multinational companies based in the agri food sector. The research suggests that Wisbech TTWA would find it difficult to compete against other well-established clusters where strong forecast employment growth is anticipated nationally, such as business and professional services. Strategies based on creating high value-added economies with anticipated growth of sectors linked to the knowledge economy may be unrealistic for a local economy like Wisbech TTWA.

Opportunities for targeting these higher value-added sectors may also be more limited. Focusing on high value-added sectors tends to require higher skills levels and at the moment there is likely to be a mismatch between the skills required to meet the demands of these new sectors and the skills currently available in the Wisbech TTWA labour market. A strategy designed to address this issue needs to be in place. In the meantime, to reduce economic inactivity and raise employment rates, a local economy also needs to provide significant numbers of jobs at lower skill levels. The agri-food sector is ideally placed to provide these jobs. Horticulture production is particularly labour intensive, employing large numbers throughout the year to sow, harvest and process crops. At the same time, there are opportunities to up-skill its existing workers and recruit new employees at higher remuneration levels where required.

The agri-food sector is progressive, with businesses adopting strategies to improve growth in productivity in response to emerging global trends. Attracting and supporting investment required to enhance this growth needs to be a priority at all strategic levels of government.

There are a number of recommendations to support businesses so that this upward trajectory is maintained. Many of these recommendations focus on the need to strengthen skills development; strengthen networks for business, provide support for innovation through research and development and to foster links with other industry clusters.

1. Skills development

There is a need to develop labour force skills in different ways. For example, to attract higher skilled workers to locate in the TTWA rather than commute through place making and investment in housing, retail and education; to increase skills of the existing labour force in the area e.g. through in-house training programmes and wider collaborations; and more generally to promote the agri-sector as a viable career path.

Business-led skills development can be supported to develop opportunities to meet demand through tailored apprenticeship schemes. It will remain important to continue working in collaboration with the College of West Anglia to deliver programmes to meet the needs of local businesses and to support local employment opportunities in the agri-food sector, particularly with a focus on stemming the out-migration of school leavers.

The College of West Anglia has collaborative initiatives with local businesses to identify problems and work through solutions to improve business growth potential, focusing, in particular, on management skills, ICT and marketing/selling skills. A distinction needs to be made, however, between small and medium sized companies, focusing on their specific issues. A one-size-fits-all approach, e.g. in relation to training and business advice, would not work.

Particular skills are needed in the agri-food sector (CCC 2012). For example:

- Young, highly skilled operators for large, complex and computerised machinery;
- Managers with a balance of technical and management skills to promote growth and efficiency;
- Scientists and professionals wishing to specialise in this sector e.g. engineers, bankers, accountants and solicitors;
- New leaders and entrepreneurs to drive the sector forward, create new products and enterprises and support growth needs of existing entrepreneurs.

To compete, the agri-food sector needs to demonstrate the career potential it has to offer, particularly by focusing on 14-16 year olds as they make career choices, and demonstrating innovative ways to attract the young e.g. through schools, offering diplomas, vocational training, apprenticeships, internships, mentoring, attracting career changers by explaining how transferable skills are valuable to sector and through retraining opportunities e.g. flexible postgraduate provision in mechanisations and supply chain management. This requires sending positive message to influencers e.g. careers services, and making sure conditions of employment are competitive and rewards to potential new entrants attractive. It also means collaborating in national initiatives to develop skills and career paths in agri-food so that Wisbech employers can tap into a higher skilled national labour pool.

As businesses innovate and focus on strategies of higher value processing and products, it will require up-skilling both for managerial and the elementary labour force, albeit in different ways. Firstly, managers need to improve skills of product selection to work out what kind of product portfolio optimises their business output, and need the skills and knowledge to subsequently plan the optimal allocation of labour and capital input. Marketing skills to sell a newly introduced product or promote a new area of the business will be also required. Even

elementary workers need to learn new routines in the introduction of new high-valued products – for example, new ways of cultivating, fertilising, watering, using pesticides, harvesting and/or feeding new kinds of animals and there needs to be awareness of training opportunities. In addition, the government/EU subsidies that can be received by participating in various environmental protection schemes might increase the agricultural GVA, although this requires skills and knowledge in examining the costs and benefits arising from the schemes.

2. Business support

The Wisbech TTWA would benefit from a stronger business network and greater support for local business development. The existing business network is weak but if strengthened would help to disseminate funding and investment opportunities, to share knowledge and innovation, and to signpost businesses to support and advice on business issues such as marketing.

Business networking could be strengthened through FDC, the Chamber of Commerce and representative bodies such as the Agricultural Industry Confederation, the Agriculture and Horticulture Development Board and representatives of small businesses. In order to innovate and grow, businesses need advice and support on practical farming and manufacturing solutions and an awareness of available opportunities.

There are also opportunities to develop mutual economic benefits with agri-food businesses in neighbouring districts and to engage and work more effectively together, for example, by promoting the manufacture of products in the Wisbech TTWA when R&D takes place in other areas e.g. the Cambridge science and knowledge cluster through NIAB, as well as other research centres such as the John Innes centre in Norwich.

The area requires better branding and national networking to promote the area as a suitable location for multinational companies and nationals. A focus on establishing a stronger brand image of the agri-food sector and in particular the competitive strengths of the Wisbech area is recommended. But there also needs to be support for small and medium enterprises (SMEs) which can provide sustainable growth and employment without the risk of future large scale disinvestment.

Policies are required to stimulate business start ups, not just through land allocations but also through new premises and business support. There is a need to strengthen dialogue with businesses across the sector and to proactively target and support employers through enhanced access to finance and expert advice.

The improvement of high speed broadband will help business development. Rural businesses, particular SMEs, which are a key source of innovation and rural wealth creation, will be affected by poor broadband connectivity if investment does not occur (CRC 2009). Wisbech is, however, already seeing commercial roll out of broadband and areas not covered by the commercial roll-out will be dealt with through the Connecting Cambridgeshire programme which will begin this year and be completed by 2015.

Non-agricultural business development by farms should also be encouraged for a sustainable agricultural sector in the Wisbech TTWA, such business includes, among others, tourism related to wildlife/greenery, machinery rental, renewable energy and bio-science related particularly hybrid agricultural products. Business activity within one traditionally categorised sector can perhaps only achieve limited growth. Multi-sectoral activities may be important, for example, agriculture and tourism; food-manufacturing and other manufacturing/tourism; and retail and service/tourism.

3. Support for innovation

More could be done to share and disseminate the latest innovations. Knowledge and research generated through developments supported regionally e.g. through The Eastern England Agri-Tech Growth Initiative or nationally e.g. through the Agricultural Technologies Strategy, need mechanisms to ensure it reaches business in the Wisbech TTWA. This information can be disseminated through existing channels e.g. the Agriculture and Horticulture Development Board and by engaging with cooperatives which reach a large number of growers. CCC/FDC could act as network brokers to develop and promote these existing methods of knowledge dissemination and to make sure they are aware of new developments.

4. Engage with wider government initiatives

Support is needed to ensure that businesses in the Wisbech TTWA are engaged in wider initiatives such as the Eastern England Agri-Tech Growth Initiative. Few stakeholders consulted during the research were aware of it. There is a need to raise awareness and to ensure that there is a strong local voice ensuring the area is represented within it and therefore can benefit from the initiative. Businesses in the Wisbech TTWA need to be linked into a network of information and knowledge exchange to ensure they are aware of developments through such initiatives and others such as those emerging from the national Agricultural Technologies Strategy and changes in legislation.

5. Providing the best environment for investment

Continued lobbying for investment in infrastructure provision e.g. to upgrade the A47 and install a rail link to March is important as it underpins economic growth, enabling better access to markets for both businesses and employment opportunities for local residents. This is a matter for the public sector (not only at the local authority level but also the national level). But the private sector could engage in collective campaigning or lobbying for investment/redevelopment.

There needs to be continued investment in social infrastructure provision. These place-making strategies to improve the quality of the living environment include providing a strong residential offer in order to attract and retain a skilled workforce. If the economy is to continue to grow then investment in retail, hospitality and leisure industries is essential not only to help support the economy but also to create vibrancy which will attract talent and further investment. There is a need to also increase confidence in the local education system to encourage professionals and families to move in.

There is a need for a greater variety of employment space to accommodate a range of new businesses as a way to diversify the local economy. This may require an increase in the allocation of employment land to help support future growth opportunities. A supportive flexible planning approach can be encouraged through identifying and providing suitable land and premises and fast tracking planning applications for large scale development.

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