



ECONOMIC FORUM CORNWALL AND ISLES OF SCILLY ECONOMIC FORUM

Cornwall County Council & Cornwall and Isles of Scilly Economic Forum

CORNWALL AND ISLES OF SCILLY SECTOR PROFILE:

AGRI-FOOD

December 2008

This research has been undertaken to update the previous sector profiles that had been requested by Cornwall Enterprise to stimulate a better understanding of their 10 priority sectors. This work will provide additional detail to underpin *Strategy and Action* in order to help to inform future decisions on the kind of support that is provided for local businesses and economic development projects.

The Agri-food sector is a term that is increasingly being used to encompass food production activities on farms and the processing of these products into added value food items. Over the past eight years there has been considerable effort and investment targeted at this sector to encourage growth via the Objective One EAGGF Programme and the private sector. During the Objective One Programme period over £100 million of total investment (50% Objective One/DEFRA Grant and 50% Private funds) were targeted at this sector and this has resulted in considerable growth as can be evidenced by the figures below. Figures produced by the Cornwall Agri-food Council show a growth in turnover from £800 million in 1998 to £1.5 billion in 2006. The industry itself has aspirations to achieve £2 billion by 2010.

This growth has also delivered improved collaboration in the supply chain with many Cornish farmers now supplying product direct to a food processor or via some form of contractual arrangement with a primary processor who then supplies more complex processing businesses. The businesses themselves range from the largest Cheddar Cheese production facility in Europe to very small, high value niche producers at the other end of the scale. By looking at agriculture and food processing as one we can begin to see the true scale of the contribution these sectors deliver to Cornwall and the Isles of Scilly. As we enter a period of food inflation the collaboration that has been encouraged over recent years will help to ensure continued closer working in the future as there is now an improved feeling of trust between partners in the supply chain.

David Rodda, Senior Agricultural Co-ordinator, Cornwall Agri-food Council Development Team

The Sector

- The narrow definition of the agri-food sector includes those enterprises engaged in agriculture and the processing of food and drink. A broader definition includes wholesale and retail activities associated with food.
- Additional data is included indicating the number of farmers.
- Employment and business unit figures, unless otherwise indicated, refer to data from the ABI.

Headline facts

- The agri-food sector in Cornwall employs 9,500, (4.9% of all employees) with 23,700 (12.1% of all employees) employed in the broader food sector.
- The sector is more significant in Cornwall than across the UK in employment terms, using the narrow definition 4.9% of total employed in all sectors in Cornwall compared to 2.4% across GB.
- There are 200 business units in the sector in Cornwall with a total of 1300 in the broader sector.
- Employment in the sector is concentrated in quite small areas in Cornwall.
- In 2006 the overall GVA for the sector (narrow) was £366 million, equal to 5.3% of Cornwall's total GVA.
- Earnings at the sector level are only available at a UK level (median gross weekly for all employees). The data indicates that whereas earnings in food processing (£378) are close to the UK average (£375), they are below for those in agriculture (£315) and wholesale (£352) and retail (£201).

Overview

- There has been an increasing awareness of the links between agriculture and other sectors of the economy, particularly food processing. Hence, to some extent the whole range of food from production through processing to the point of sale can be regarded as one process.
- The environmental impacts of the sector are increasingly recognised. This applies particularly to agriculture, which despite a declining contribution to GVA, has major land-use impacts upon the land surface. Food processing can also have environmental impacts due to the waste produced during operations.
- With increasing concern over rising commodity prices, greater concern has been raised over food security. *'In the UK, the self-sufficiency ratio of domestic production to consumption has been in noticeable decline over the last decade. In the context of climate change, international energy concerns, geopolitical tensions and international terrorism, a growing sense of the potential for disruption to domestic food supplies in an uncertain world.'* (Defra, 2006, Food Security and the UK: An Evidence and Analysis Paper).
- *The value of woodland and forestry to the regional economy in terms of actual expenditure constitutes only part of the overall asset. Other values include forestry and woodland's role in fixing carbon, sustainable energy, biodiversity, landscape enhancement and community well-being.* (Forestry Commission and SWRDA, 2002).
- The UK Food and Drink Manufacturing (FDM) sector has performed strongly over recent years, with most relevant economic indicators, such as value added, productivity and profitability, demonstrating its continued overall good health. (Defra, 2007, UK Food and Drink Manufacturing: An Economic Analysis).
- The food market is subject to continuous change reflecting often conflicting consumer attitudes – for example, demand for greater convenience foods, locally sourced products and organic; and external events – such as BSE, and FMD.

- Food processing in Cornwall *'is dominated by a small group of very large processors and manufacturers who supply the national and international market.'* (Lobley, et al. 2006).
- The market for food products in Cornwall varies, with some manufacturers focusing on the local market while others, the *'bulk commodity producers'* (Lobley, et al. 2006), supply almost exclusively a national market.
- The degree to which raw materials are sourced locally varies. Some materials are either not available locally e.g. fats and flour, or there is insufficient volume locally to meet demand, or the quality of local sources may not be suitable. (Lobley, et al. 2006).
- The clear links within the agri-food sector are apparent in a number of ways, for example, growth in output of processed food may lead to a greater use of imported materials unless local production can be increased.
- Rising food prices may impact upon consumer demand and hence the nature of the sector. *'In the early 1990s, economic downturn saw a likelihood of consumers to trade down from premium foods to value brands.'* (ADAS, 2007). Recent food price increases could influence demand in a similar way.

Employment

- There are 9,500 employee jobs in the agri-food sector in Cornwall.
- This equals 4.9% of all employees in Cornwall. The equivalent figure for the sector across GB is 2.4%.
- Between 1999 and 2006 employment in the sector in Cornwall increased by 17%, compared to declines of 19% across the SW and 16% across GB.
- Growth in employment in this sector in Cornwall is overwhelmingly in full time employment.
- Full time jobs now account for 81% of the total employment in the agri-food sector in Cornwall.
- There are an additional 10,400 jobs in the sector accounted for by farmers.
- Looking at the broader sector (agriculture, food processing, wholesale and retail), gives a total of 23,700 employees (with an additional 10,400 farmers).
- Table 1 shows that in 2006 employment in food and drink manufacturing in Cornwall was twice as significant than across GB. However, analysis of a broader definition of the sector (to include retail and wholesale activities) closes the gap, though the percentage in Cornwall is still 1.6 times the GB figure.

	Cornwall	SW	GB
Agi-food (narrow)	4.9	2.8	2.4
Agri-food (broad)	12.1	8.6	7.4

Table 1

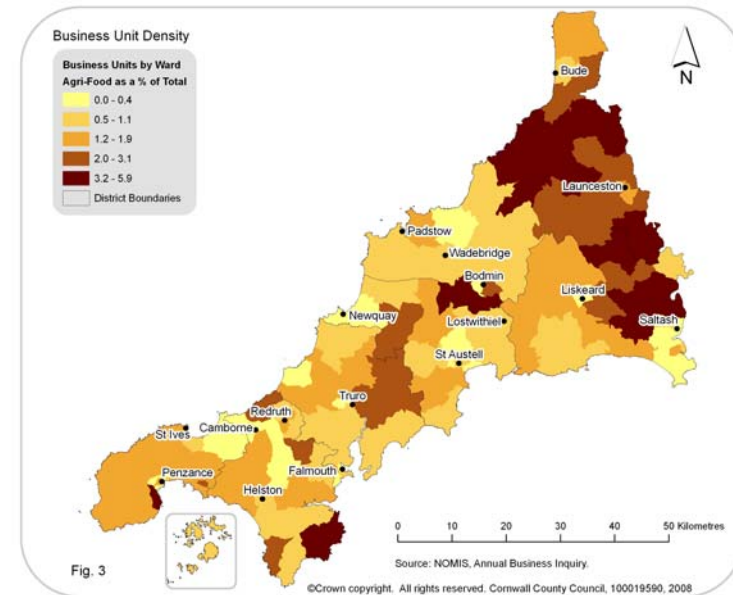
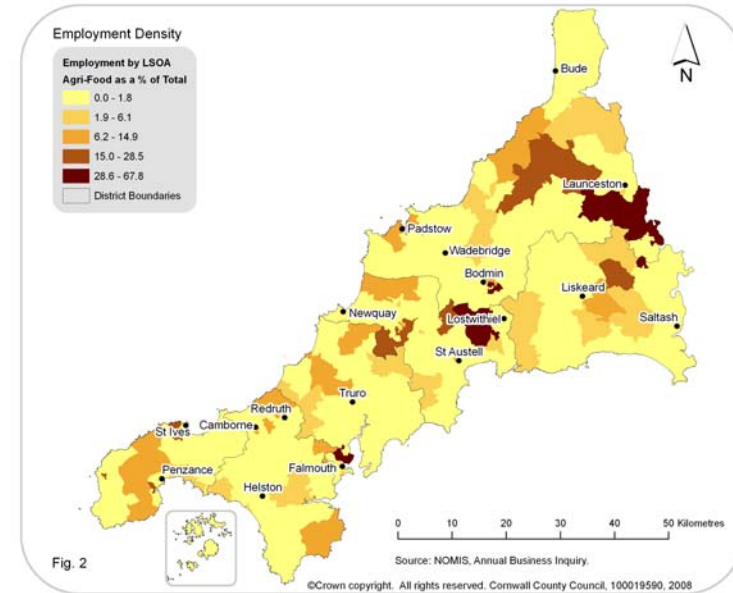
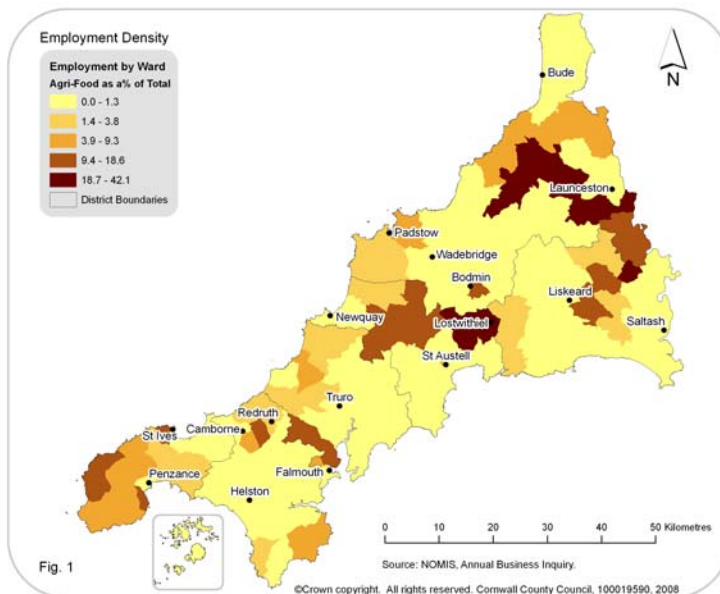
Business Units

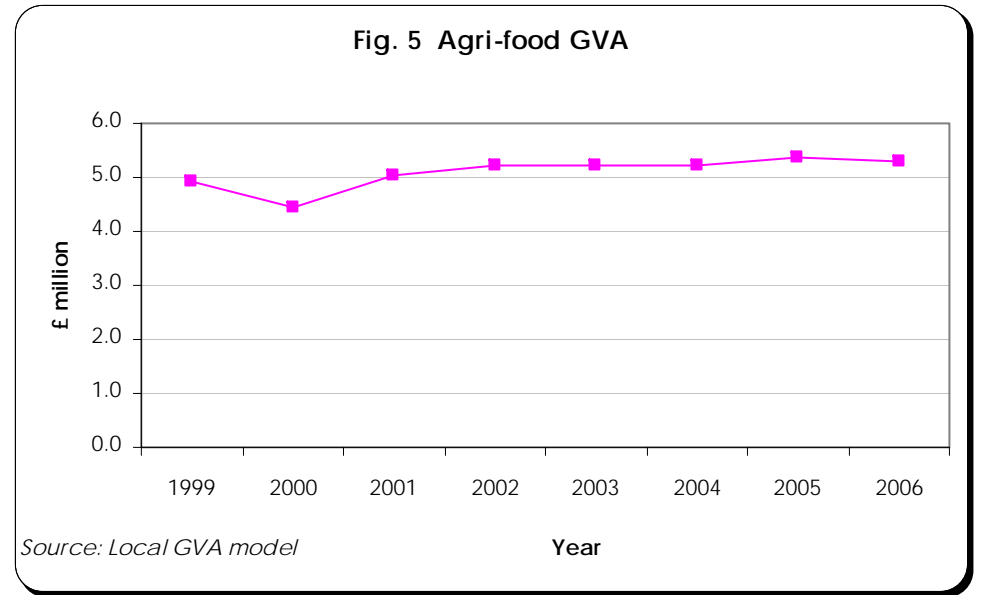
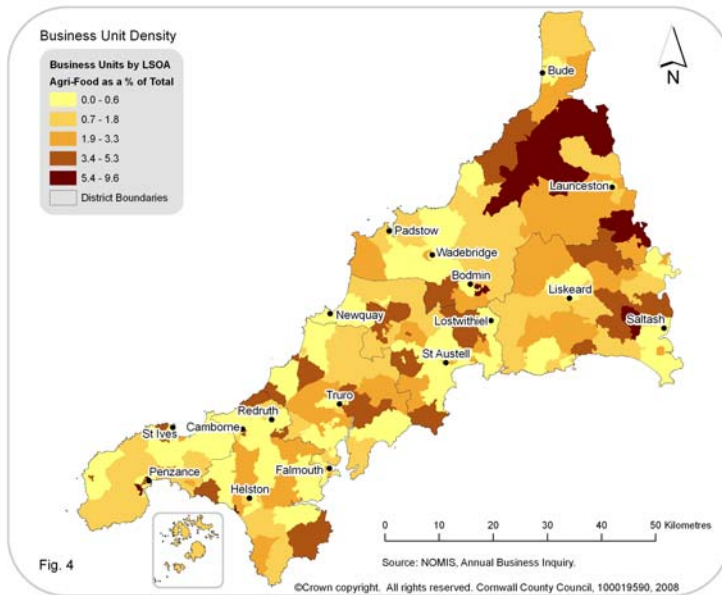
- There are 200 business units in the agri-food (narrow) sector in Cornwall.
- Between 1999 and 2006 the number of business units in Cornwall increased by 9%.
- In contrast, across the SW there was a fall of 11% and across GB the numbers fell by 10%.
- There are 1,300 business units in the broad agri-food sector in Cornwall.
- Since 1999 the total for the broad sector has declined by 13%, in line with the trend across the SW and GB.
- Using the broad definition of the sector, food and drink constitute 6% of total units in Cornwall, This compares to 4.4% and 4.8% across the South West and Great Britain.

Spatial distribution

- Two-thirds of all employment in agri-food is located in seven wards - Bodmin St Petroc (1,400), Callington (900), Illogan South (600), South Petherwin (600), Lostwithiel (500), Rock (400), and Poltair (200).
- Food and drink manufacturing accounts for over 20% of employment in four wards - South Petherwin, Callington, Lostwithiel, Tremaine.
- There are six LSOAs where the sector accounts for a third or more of employment - Luxulyan and Lanlivery West, Callington North and Kelly Bray, Lezant and Treburley, Lawhitton, Lewannick and South Petherwin, Flushing and Mylor Bridge South and Bodmin St Petroc Ward South East.
- Over half of all employment in the sector is concentrated in five LSOAs - Bodmin St Petroc Ward South East, Callington North and Kelly Bray, Pool West and Tregajorran, Lawhitton, Lewannick and South Petherwin and Luxulyan and Lanlivery West.
- There are eight wards, which with one exception are rural, where agri-food business units account for 4% or more of the total.
- Conversely, the highest numbers of actual units are divided between rural and urban wards, reflecting the concentration of food processing units in urban areas.
- There are ten LSOAs where agri-food businesses make up 5% or more of the total.

[Data used in analysis of the spatial distribution uses ABI data only, hence the total equals 7,100 not 9,500].





Gross Value Added

- GVA data is only available for the narrow definition of agri-food sector in Cornwall, ie wholesale and retail is excluded.
- The sector has shown an increase in absolute terms, growing from £199 in 1999 to £366 in 2006.
- As a proportion of total GVA, its contribution has increased from 4.9% to 5.3%.
- The sector has grown at an annual rate of 9.1%, above the average annual rate for the Cornish economy of 7.9%.

Productivity

- Productivity in the sector, measured as GVA per worker equals £20,100, or 73% of the average in Cornwall (?).
- Productivity in the sector, measured as GVA per Full Time Equivalent (FTE) equals £23,300, 68% of the average in Cornwall (?).

Earnings

- Median gross weekly sector earnings data is available at the UK level. For all employees in 2007 this equalled £375.
- Employees in the food processing sector earned £378; those in agriculture £315; wholesale of food £352 and retail £2001.

Caveats:

The size of the sector in this profile may differ to other research as each sector is made up by aggregating a number of other "subsectors" (see notes for employment SIC sectors incorporated in this profile). Other studies may use a broader or narrower definition.

Totals from each profile should not be added as data included within one profile may also be included within another profile. For example, 3220 - Manufacture of television and radio transmitters... and 3230 - Manufacture of television and radio receivers ..., are included in both the ICT sector profile and the Creative Industries (Broad) sector profile. Fish processing is included in both food and drink and fishing.

This profile only analyses the *economic* value of a sector. The social, cultural and environmental value of a sector should also be thoroughly considered.

Sector definitions used in this profile may vary slightly between GVA and employment as the GVA data does not have such a detailed sector breakdown. This is because calculating GVA on a local level relies upon numerous data sources, some of which are only available at a broad sector level. For this reason, it has not been possible to include GVA data for some of the more specific or cross-cutting sectors without further extensive research. In addition, the national accounting system's classification limits the way in which we can understand the economy, for example, for the marine profile surf shops and wetsuit manufacturing cannot be drawn from the current structure, they are included in retail and rubber manufacturing, respectively. Again, further extensive research would be required to penetrate this detail.

All data in this profile refers to workplace.

Business units

Business units, in this publication, refer to business premises and/or head offices. This is the most comprehensive measure of activity as it incorporates counts of individual branches or sites – this is more useful than mapping the enterprise or business alone as this would only provide a count of the location of each head office.

The source of the business units data is the Inter-Departmental Business Register. This register is produced by the Office for National Statistics using VAT (value added tax) and PAYE (pay as you earn) records, therefore, it captures all businesses that either trade over the VAT threshold – for 2006 a turnover of 61,000, and/or are PAYE registered – employ at least one member of staff who earns more than £94/week, or £408/month.

Annual Business Inquiry (ABI) - Employee Analysis, Workplace Analysis

Data source: NOMIS. Based on a sample.

Discontinuities in 2003 and 2006 make comparisons difficult over a period of time. The 2006 discontinuity means that comparisons of the 2006 ABI employment estimates with earlier years do not provide a reliable comparison.

Elements contributing to the discontinuity include:

1. Change in reference date from December to September.
2. Use of Business Register Survey data within the ABI/1 results.
3. Change to the Minimum Domain Methodology.

NOMIS state that 'It is not possible to measure the impact of the changes made precisely, however the scale of the overall discontinuity between the 2005 and 2006 ABI/1 is estimated to be in the range of 150,000 to 350,000 (0.6 to 1.3 per cent of the total number of employees) in a downward direction.'

All employment data from the ABI employee analysis has been rounded to the nearest 100 in line with release of data rules.

Geographical anomalies

Data from different sources differs in its geographical coverage. The ABI covers Great Britain, ASHE data covers the United Kingdom.

Earnings data

Earnings data by employment sector is only available at a UK level. Earnings levels in Cornwall are substantially lower and although it is expected that the difference applies across all sectors, the exact relationship is unknown, therefore care should be taken in interpreting the data.

Data:

Employment

The employment figures in this profile refer to the number of jobs in the agri-food sector. Figure 1 uses the total figure, thus incorporating both part and full time work. (Casual labour in the agricultural sector has been excluded).

Agri-food sector (excluding farmers)

	All PT	All FT	All
1999	1,800	6,300	8,100
2000	1,700	7,200	9,000
2001	1,600	7,200	8,800
2002	1,500	7,200	8,700
2003	1,400	7,100	8,500
2004	1,500	7,100	8,600
2005	1,600	7,600	9,200
2006	1,800	7,700	9,500
Change	0	1,400	1,400

Source: NOMIS, Annual Business Inquiry © Crown Copyright

Agri-food sector broad (excluding farmers)

	All PT	All FT	All
1999	6,000	11,500	17,500
2000	7,500	12,100	19,600
2001	7,800	12,100	19,900
2002	7,300	11,900	19,200
2003	7,000	11,600	18,600
2004	7,500	11,600	19,100
2005	7,500	12,100	19,700
2006	7,700	12,200	19,900

Source: NOMIS, Annual Business Inquiry © Crown Copyright

Agri-food broad definition (excluding farmers)

	Part Time Workers	Full Time Workers	Total
1999	8,900	12,100	20,900
2000	9,000	12,600	21,600
2001	9,300	13,400	22,700
2002	10,400	13,400	23,800
2003	10,200	13,800	24,000
2004	10,300	13,400	23,700
2005	9,400	14,400	23,800
2006	9,100	14,600	23,700

Source: NOMIS, Annual Business Inquiry © Crown Copyright

Agri-food broad definition (excluding farmers)

	Cornwall & IoS	South West	Great Britain
	%	%	%
1999	13.7	9.9	8.2
2000	13.3	9.5	8.1
2001	13.2	9.2	8.2
2002	13.1	9.5	8.4
2003	13.1	9.3	8.0
2004	13.1	9.2	8.2
2005	12.8	8.9	7.8
2006	12.1	8.6	7.4

Source: NOMIS, Annual Business Inquiry © Crown Copyright

Agri-food broad definition (including farmers)

	Part Time Workers	Full Time Workers	Total
1999	13,100	17,300	30,300
2000	14,800	17,400	32,200
2001	15,500	18,200	33,800
2002	16,200	18,100	34,300
2003	15,800	18,300	34,100
2004	16,300	17,900	34,200
2005	15,300	18,900	34,200
2006	15,000	19,100	34,100

Source: NOMIS, Annual Business Inquiry, Defra, Agricultural and Horticultural Census, © Crown Copyright

Business Units

Food and drink (broad) as a percentage of total units

	Cornwall and Isles of Scilly	South West	Great Britain
1999	8.2	5.8	6.1
2000	7.8	5.5	5.9
2001	7.5	5.4	5.8
2002	7.2	5.3	5.7
2003	6.9	5.1	5.4
2004	6.4	4.8	5.3
2005	6.0	4.6	5.0
2006	6.0	4.4	4.8

Source: NOMIS, Annual Business Inquiry © Crown Copyright

Gross Value Added (GVA)

Agri-food GVA data has been sourced from the Local GVA model for Cornwall level data and the Office for National Statistics (ONS) for UK statistics. The following tables provide the raw data from which the graphs on page one were produced.

GVA (£ million)

	Cornwall	UK
1999	199	29085
2000	195	28652
2001	241	29103
2002	279	29896
2003	308	31309
2004	313	32222
2005	342	na
2006	366	na

Source: Owen Nankivell, (2008) *Local GVA model*; ONS, (2006), *UK Input-Output Analyses*.

GVA (% of total)

	Cornwall	UK
1999	4.9	3.6
2000	4.4	3.4
2001	5.1	3.3
2002	5.2	3.2
2003	5.2	3.2
2004	5.2	3.1
2005	5.4	na
2006	5.3	na

Source: Owen Nankivell, (2008) *Local GVA model*; ONS, (2006), *UK Input-Output Analyses*.

Earnings

Employee weekly pay – agri-food sector [NB Earnings data by employment sector only available at a UK level].

Weekly pay - Gross (£) - For all employee jobs: United Kingdom, 2007

Description	Code	Median	AS % of all
ALL EMPLOYEES		374.9	100.0
AGRICULTURE, HUNTING AND FORESTRY	A	315.3	84.1
Growing of cereals and other crops not elsewhere classified	111	335.4	89.5
Growing of vegetables, horticultural specialities and nursery products	112	320.7	85.5
Growing of fruit, nuts, beverage and spice crops	113	x	na
Farming of cattle, dairy farming	121	313.7	83.7
Farming of sheep, goats, horses, asses, mules and hinnies	122	266.2	71.0
Farming of swine	123	x	na
Farming of poultry	124	x	na
Other farming of animals	125	x	na
Growing of crops combined with farming of animals (mixed farming)	130	271.7	72.5
Agricultural service activities; landscape gardening	141	315.2	84.1
Animal husbandry service activities, except veterinary activities	142	268.5	71.6
Hunting, trapping and game propagation including related service activities	150	425.8	113.6
Forestry and logging	201	356.6	95.1
Forestry and logging related service activities	202		0.0

Manufacture of food products and beverages	15	377.6	100.7
Production, processing and preserving of meat and meat products	151	330.5	88.2
Processing and preserving of fruit and vegetables	153	375.0	100.0
Manufacture of vegetable and animals oils and fats	154	328.7	87.7
Manufacture of dairy products	155	396.7	105.8
Manufacture of grain mill products, starches and starch products	156	472.4	126.0
Manufacture of prepared animal feeds	157	478.1	127.5
Manufacture of other food products	158	352.1	93.9
Manufacture of beverages	159	509.9	136.0
Manufacture of tobacco products	160	596.0	159.0

Earnings – Wholesale and retail

Weekly pay - Gross (£) - For all employee jobs: United Kingdom, 2007

Description	Code	Median	AS % of all
ALL EMPLOYEES		374.9	100.0
Agents involved in the sale of food, beverages and tobacco	5117	x	na
Wholesale of food, beverages and tobacco	513	352.0	93.9
Wholesale of fruit and vegetables	5131	341.0	91.0
Wholesale of meat and meat products	5132	345.2	92.1
Wholesale of dairy produce, eggs and edible oils and fats	5133	388.8	103.7
Wholesale of alcoholic and other beverages	5134	422.5	112.7
Wholesale of tobacco products	5135	364.9	97.3
Wholesale of sugar and chocolate and sugar confectionery	5136	x	na
Wholesale of coffee, tea, cocoa and spices	5137	482.9	128.8
Wholesale of other food including fish, crustaceans and molluscs	5138	341.3	91.0
Non-specialised wholesale of food, beverages and tobacco	5139	312.1	83.2
Retail sale of food, beverages and tobacco in specialised stores	522	200.6	53.5
Retail sale of fruit and vegetables	5221	223.9	59.7
Retail sale of meat and meat products	5222	272.9	72.8
Retail sale of fish, crustaceans and molluscs	5223	x	na
Retail sale of bread, cakes, flour confectionery and sugar confectionery	5224	186.7	49.8
Retail sale of alcoholic and other beverages	5225	174.2	46.5
Retail sale of tobacco products	5226	x	na
Other retail sale of food, beverages and tobacco in specialised stores dispensing chemists	5227	x	na

Source: ONS, (2007), Annual Survey of Hours and Earnings, Table 16.1a Weekly pay - Gross (£) - For all employee jobs: United Kingdom, 2007

The table below shows earnings levels in Cornwall compared to both the South West and Great Britain. All data for 2007.

Median Earnings by workplace 2007

Area	All		All Full-time		All Part-time	
	£	%	£	%	£	%
Cornwall	304.9	81.3	373.3	81.7	140.4	97.6
South West	349.2	93.1	427.8	93.7	144.7	100.6
United Kingdom	374.9	100	456.7	100	143.9	100
Area	Male		Male full-time		Male part-time	
	£	%	£	%	£	%
Cornwall	358.9	77.3	399	80.1	149.7	108.6
South West	441.4	95	476.5	95.6	147.9	107.3
United Kingdom	464.5	100	498.3	100	137.8	100
Area	Female		Female Full-time		Female Part-time	
	£	%	£	%	£	%
Cornwall	239	83.1	344.4	87.4	138.7	95.3
South West	267	92.9	363.3	92.2	144	98.9
United Kingdom	287.5	100	394	100	145.6	100

Source: Annual Survey of Hours and Earnings, (2007). Table 7.1a Weekly pay - Gross (£) - For all employee jobs: United Kingdom, 2007.

Sector profiles in this format:

Advanced Engineering
Agriculture & forestry
Agri-food
Creative industries
Environmental Technology
Fishing
Food and Drink
Information & communication technology
Manufacturing
Marine
Medical & health
Tourism
Voluntary

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Notes:

Spatial distribution

The maps indicating the spatial distribution of employment and business units use both ward and Lower Super Output Areas. The wards are those used for District Council elections. Super output areas are a new geographical hierarchy designed to improve the reporting of small level statistics. They are now used in preference to administrative boundaries such as wards as they are of roughly equal population levels and are based on the area's characteristics, not historical events. The lower super output areas have a mean population size of 1,500.

What is Gross Value Added?

GVA measures the contribution each sector, industry or producer makes to the economy, and when added, the total value of economic activity in a particular area. It is used as an indicator of the value of economic activity that takes place within a sector, or area.

Agri-food in this profile refers to the following SIC(2003) activities:

0100 : DEFRA/Scottish Executive Agricultural Data

0111 : Growing of cereals and other crops not elsewhere classified

0112 : Growing of vegetables, horticultural specialities and nursery products

0113 : Growing of fruit, nuts, beverage and spice crops

0121 : Farming of cattle, dairy farming

0122 : Farming of sheep, goats, horses, asses, mules and hinnies

0123 : Farming of swine

0124 : Farming of poultry

0125 : Other farming of animals

0130 : Growing of crops combined with farming of animals (mixed farming)

0141 : Agricultural service activities

0142 : Animal husbandry service activities, except veterinary activities

0150 : Hunting, trapping and game propagation including related service activities

0201 : Forestry and logging

0202 : Forestry and logging related service activities

Food & drink manufacturing in this profile refers to the following SIC(2003) activities:

1511 Production and preserving of meat

1512 Production and preserving of poultry meat

1513 Production of meat and poultry meat products

1520 Processing and preserving of fish and fish products

1531 Processing and preserving of potatoes

1532 Manufacture of fruit and vegetable juice

1533 Processing and preserving of fruit and vegetables not elsewhere classified

1541 Manufacture of crude oils and fats

1542 Manufacture of refined oils and fats

1543 Manufacture of margarine and similar edible fats

1551 Operation dairies and cheese making

1552 Manufacture of ice cream

1561 Manufacture of grain products

1562 Manufacture of starches and starch products

1571 Manufacture of prepared feeds for farm animals

1572 Manufacture of prepared pet foods

1581 Manufacture of bread; manufacture of fresh pastry goods and cakes

1582 Manufacture of rusks and biscuits; manufacture of preserved pastry goods and cakes

1583 Manufacture of sugar

1584 Manufacture of cocoa, chocolate and sugar confectionary

1585 Manufacture of macaroni, noodles, couscous and similar farinaceous products

1586 Processing of tea and coffee

1587 Manufacture of condiments and seasonings

1588 Manufacture of homogenised food preparations and dietetic foods

1589 Manufacture of other food products not elsewhere classified

1591 Manufacture of distilled potable alcoholic beverages

1592 Production of ethyl alcohol from fermented materials

1593 Manufacture of wines

1594 Manufacture of cider and other fruit wines

1595 Manufacture of other non-distilled fermented beverages

1596 Manufacture of beer

1597 Manufacture of malt

1598 Manufacture of mineral waters and soft drinks

In addition, the broader definition of food and drink also incorporates food retail and wholesale

For further information about this or the other profiles in the series please contact Peter Wills, Corporate Economy and Europe Unit, Cornwall County Council: 01872 322520, pwills@cornwall.gov.uk