

The land-based industries in the South Downs National Park 2020

Introduction

The land-based industries are crucial to the character and conservation of the South Downs National Park. They comprise farming and the industries connected to the land and environment, including horticulture, viticulture, food production, equine activities, forestry, landscape and environmental conservation. This fact sheet highlights the main characteristics of the current land-based industries in the SDNP as well as looking at some future trends and forms one of a series on key sectors of economic, social and environmental importance in the South Downs National Park.¹

Key facts

The land-based sector including *Farming, Forestry, Logging, Horticulture, Viticulture and Wine Production, Veterinary activities and Environmental Consultancy* contains a minimum of 1,189² businesses in the South Downs National Park and over 5,000 jobs, estimated as follows:

LAND BASED SECTOR	BUSINESSES	JOBS
Farming	950	3,000
Forestry, silviculture and logging	40	125
Horticulture	52	Not available
Viticulture and Wine Production	51	1,650
Veterinary Activities	35	250
Environmental and conservation	30	Not available
Equine including racehorses, stables etc.	16	Not available
Aquaculture and Fishing	15	Not available

This represents 14.62% of the business population of 8,135 and at least 9.09% of employment. The land-based sector also has a wider impact on the landscape and environment in the Park and is vital to sustainable development.

GVA

The Agriculture, Forestry & Fishing sector alone provides a conservatively estimated direct Gross Value Added of £85.76m to the economy of the SDNP or £188.67m, including indirect contribution. This does not include all the land-based sectors e.g. environmental conservation or *Food & Drink* which is examined separately. A recent study by Vinescapes has

¹ Food production not included as it is the subject of a separate fact sheet

² These figures are drawn from official business statistics covering VAT and PAYE registered businesses and those registered with Companies House, They do not include self-employed or informal businesses and are minimum figures only

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concluded that the wine production sector in the Park alone contributes GVA of £13m per annum

Farming

Saddlescombe Farm

A 450 acre farm, 5 miles from Brighton, operates under a National Trust tenancy and is run as a traditional sheep, beef and arable farm. The husband and wife team are committed to high animal welfare, protecting and enhancing the natural environment, and involving the local community. Livestock includes 450 breeding ewes, lambs, 7 rams, a herd of pedigree Sussex cows grazing on the species rich chalk grasslands of the South Downs. Saddlescombe have diversified, offering a range of visitor experiences, for example: shepherd for the day, farm visits and open days.

- There are 665³ registered businesses in the sector. Defra's data show 950⁴ commercial agricultural holdings in the South Downs National Park in 2016, the latest year for which these statistics are available
- The majority of farms are involved in growing cereals and general cropping, lowland grazing or mixed farming
- Nationally, most farms operate as sole traders (52%) or partnerships (39%) with a minority (8%) choosing limited company structures⁵. In the Park around 14% are estimated to be limited companies suggesting a more formally structured business base
- Among the 132 farms that are formally structured as limited companies, mixed farming is the largest type of holding accounting for 32% or 42 businesses. This is followed by growing of cereals which makes up 23% or 31 farms.
- The last Defra farm survey data⁶ of farms of more than 5 hectares showed 24% were growing cereals, 17% involved in general cropping and 36% having lowland grazing of livestock as the main activity
- There are an estimated 135,000 sheep, over half a million poultry, 39,000 cattle including beef and dairy and over 27,000 pigs, adding to the character and attractions of the South Downs National Park

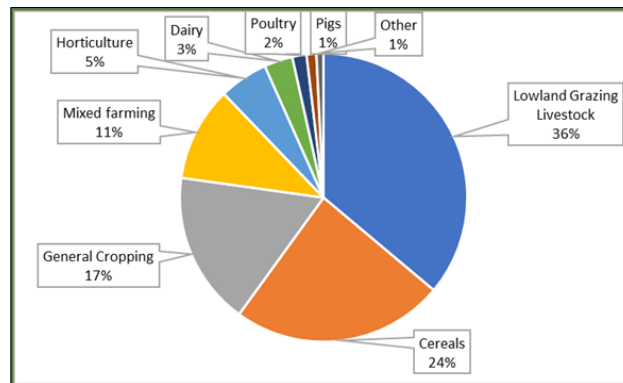


Figure 1: Percentage change in livestock numbers 2009 to 2016 in the South Downs National Park
Source: Defra Survey of Farms 2017

³ ONS UK Business Counts (enterprises)

⁴ Defra Survey of Agriculture and Horticulture 2017 (i.e. the most recent data for National Parks.)

⁵ Defra Survey of Agric Defra Survey of Agriculture and Horticulture 2017 (i.e. the last time data was produced for National Parks.)

⁶ The Defra survey uses a slightly different methodology for classification according to the principle activity so that mixed farming numbers tend to be lower

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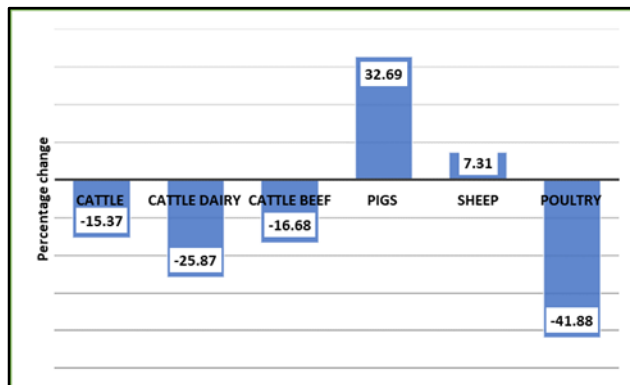


Figure 2: Percentage of agricultural holdings by type in the South Downs National Park 2016

Source: Defra Survey of Agriculture and Horticulture 2017 (latest data for National Parks)

The majority of commercial holdings (33%) are larger with more than 100 hectares according to Defra’s farm survey.

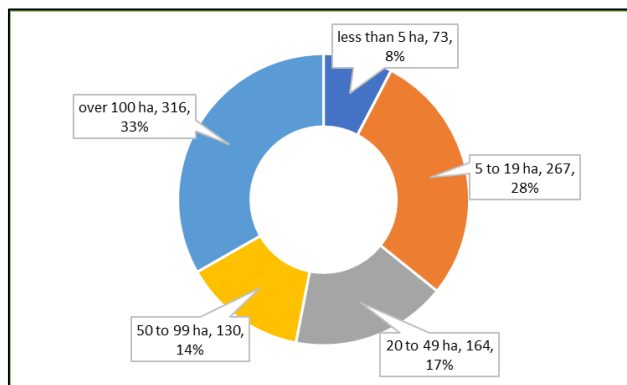


Figure 3: Percentage agricultural holdings by size in the South Downs National Park 2016

Source: Defra Survey of Agriculture and Horticulture 2017 (latest data for National Parks)

Farm employment grew slightly between 2010 and 2016 by around 3% to 3,000 jobs. Full time farmers and managers and casual labour increased but salaried employees declined as a percentage of employment, indicating a growing dependence on migrant labour in the sector.

Horticulture

Horticulture is an important industry along the coastal plain, particularly in West Sussex where the high light levels, climate and topographical conditions make it ideally suited. The West Sussex Growers Association estimate that annual turnover of the local industry is in excess of £1bn. The industry includes both ornamental horticulture (garden plants and products and garden tourism) and growing of fruit and vegetables for consumption.

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Although the majority of commercial fruit and vegetable growing lies outside the Park boundaries and along the coastal plain, there are 52 agricultural holdings with the Park which are classified as horticultural by Defra. 22 are limited companies according to the Companies House database and are involved in fruit and vegetable growing and plant propagation. The majority of these appear to be ornamental horticultural nurseries although there are also some orchards.

Both ornamental and food producing horticulture are growth industries with an estimated £1.4bn spend in the South East on ornamental horticultural goods alone⁷ and bring additional benefits in terms of tourism to the many ornamental gardens for which the area is known, in carbon reduction and in ecosystem services. This has to be balanced against extra demand on water and potential landscape character change.

Employment profiles vary from seasonal fruit picking and lower skilled gardening jobs to very high qualified technical occupations including agronomists, arboriculturist, landscape design, management, sales and technical jobs. West Sussex Growers Association points to growing technical skills shortages as technological advances such as robotics and AI, as well as environmental considerations, drive up demand for higher skills.

Forestry, Silviculture and Logging

The South Downs National Park has more woodland than any other National Park in England. Forestry and logging accounts for a further 40 registered businesses in the South Downs National Park⁸. This includes: 18 businesses who list their main activity as *Silviculture and Other Forestry Activities*, 6 who list their main activity as *Logging*, and 12 who are categorised as *Support Services to Forestry*. In practice, these categories seem to be interchangeable and contain a mix of arboriculturists, tree surgeons, equipment and plant hire and timber suppliers. Many of these businesses would appear to be small with just 140 jobs listed for the sector though this is likely to be an underestimate⁹. 125 of these jobs are in *Silviculture and Other Forestry Activities* while 15 are in *Support Services to Forestry*. Full-time employees make up the majority with 100 jobs.

In the National Park, sensitive management of woodland and conservation of the natural environment are the primary concern and the small scale of businesses in the industry is in keeping with this. The figures are, however, likely to be an underestimate as self employed and very small businesses not registered as limited companies and/or for VAT and/or PAYE will not be included.

⁷ The Economic Impact of Ornamental Horticulture and Landscaping In The UK October 2018 Oxford Economics

⁸ ONS UK business counts. (enterprises)

⁹ ONS Business Register & Employment Survey (BRES) 2018

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Viticulture and wine production

Viticulture is one of the fastest growing industries in the UK. In 2019, Wine GB noted that more production is forecast in the years to come due to the ongoing rapid increase of vineyards across the country:

Recent research carried out by Vinescapes on behalf of the SDNPA mapped a total of 51 vineyards within or partly within the South Downs National Park, 4 in East Sussex, 11 in Hampshire, 16 in Surrey and 23 in West Sussex.

Viticulture and wine production in the South Downs National Park is already making a significant contribution to the local economy and employment; according to Vinescapes estimates, it contributes nearly £54 million GVA per annum and provides the equivalent of 1,650 full time jobs. It has the potential to grow further and make a significant contribution to the economic well-being of the local community through increases in tourism and employment and may also provide opportunities for farm diversification. However, this expansion has to be managed sensitively bearing in mind the impact on the visual character of the South Downs National Park and on the local communities.

Key trends and challenges

With such a broad ranging sector, there are many factors to take into account including:

- Climate change and increased climatic volatility which will have an impact on the type and extent of agriculture
- Increased productivity requirements driving up the need for more efficient outdoor and possibly more intensive indoor livestock raising methods as well as increased use of polytunnels to extend growing seasons and increase yield
- Growing use of technology such as AI and robotics in the field and in crop storage
- Renewables will allow more efficient local energy production.
- Demand for more local produce will increase
- Diversification will continue to be a key challenge for farmers and other land-based industries
- Pressure on resources such as water and energy will continue to rise leading to greater use of rain water harvesting and storage, controlled irrigation as well as on recycling systems, renewable energy systems, carbon dioxide capture and green waste management and other changes
- Education and training will continue to be key issues at all levels of the land-based industries along with attracting new entrants to replace the ageing workforce.
- Maintaining the labour supply of migrant and casual labour, particularly due to the Corona virus pandemic

Nutbourne Vineyard
The family-owned winery is based in a 19th-century windmill midway along the Downs. The “Terroir” at Nutbourne is a unique and ideal wine growing environment – a warm microclimate protected by the South Downs, gentle south-facing slopes and the same fertile green sand soil as the Champagne region in France. There are 26 acres under vine.

The vineyards are tended throughout the year, each vine pruned by hand through the winter and then carefully trained, trimmed and nurtured during the summer months. The landscape is also looked after with areas preserved for the habitat of wild flowers, insects and wildlife to balance the cultivation. In 2015 its still white wine won a gold medal at the International Wine and Spirit Competition, the first English still wine to win. The sparkling wines are also renowned. Nutbourne is open to visitors and runs a series of events including the Jazz in the Vines concerts which take place in August.

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and following Brexit continue to be major concerns for the land-based industries.

Resilience and growth potential

Subsector	Covid 19 threat level	Resilience	Future growth potential
Farming	Low	Medium	Mixed
Forestry, silviculture and logging	Low	Low	Low
Horticulture: fruit and vegetable	Low	Low	Mixed
Horticulture: ornamental	High	Low	Mixed
Viticulture and Wine Production	Low	High	High
Veterinary Activities	Medium	Medium	High
Environmental and conservation	Low	High	High
Equine including racehorses, stables etc.	High	Medium	Low
Aquaculture and Fishing	Medium	Low	Low

Notes

The information on land-based businesses in the South Downs National Park is drawn from a number of sources, including:

- ONS UK Business Counts which provide data on the VAT and/or PAYE registered business population
- Companies House data which provide publicly available information on limited companies but which do not include less formal businesses
- ONS Business Register and Employment Survey (BRES) which provide employment numbers and status e.g. full time and part time. This does not include farm based employment
- Defra's annual farm survey data for National Parks 2017 which is compulsory and is therefore effectively a Census although it does not include very small non commercial holdings.
- Other surveys and reports on the sub sectors e.g. viticulture, horticulture