

INTRODUCTION

This release covers the results of the Horticulture Labour Barometer up to and including Monday 7 September.

The Horticulture Labour Barometer provides information on real time labour requirements from a sample of edible horticulture producers in England and Scotland. The edible horticulture sectors sampled are field vegetables, soft fruit, tree fruit and protected edibles. The aim of the Horticulture Labour Barometer is to provide industry and Government with independent evidence to establish the reality of the impact that COVID-19 is having on labour availability.

In total, 42 edible horticulture producers have opted in to contribute to the Horticulture Labour Barometer. When asked in the week ending 29 May, this sample of growers require approximately 23 thousand seasonal workers in total this year. A breakdown of contributors by sector and by region is shown in the table below. Please note the sector total is greater than the total number of contributors as some businesses in the sample grow for more than one sector. Over the period up to Monday 7 September, between 37 and 42 companies and co-operatives submitted a response. Please note as of week commencing 13 July, contributors have been contacted on a fortnightly basis, instead of weekly.

Total number of contributors by sector and region

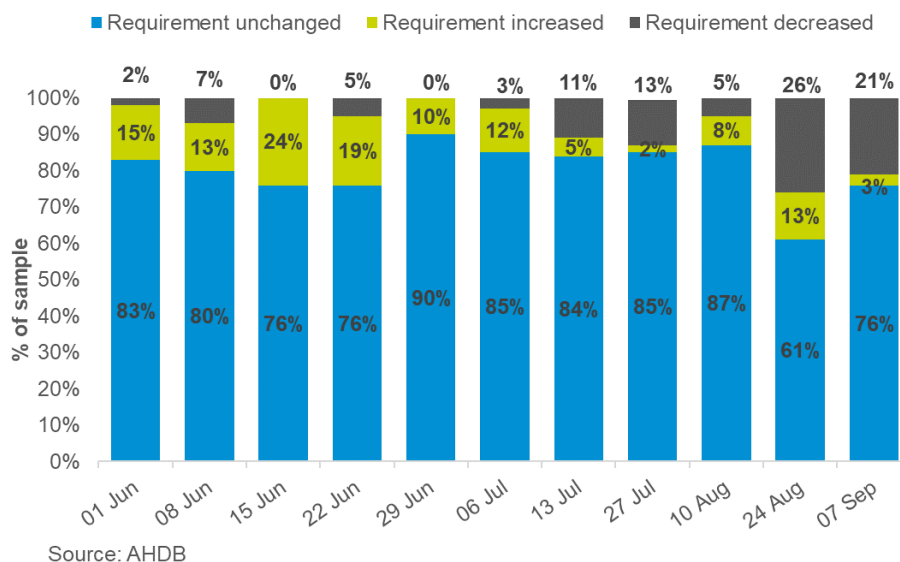
Sector	Number of companies
Field vegetables	18
Protected edibles	10
Soft fruit	20
Tree fruit	6
Region	Number of companies
South East	14
East*	9
West**	8
North***	4
Scotland	7

*East (East of England and East Midlands), **West (West Midlands and South West), ***North (Yorkshire and North West)

LABOUR REQUIREMENTS

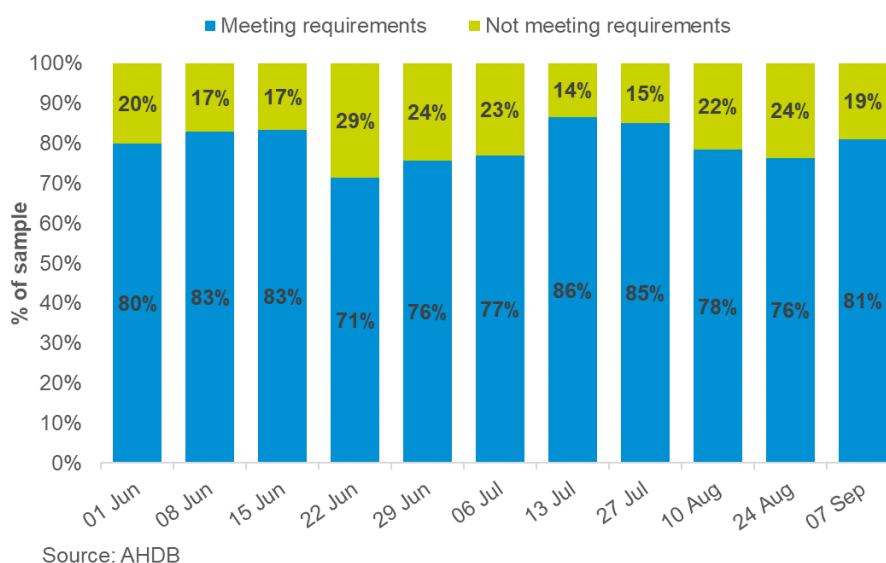
- When asked in the week ending 29 May about seasonal labour requirements for the whole year, the 42 growers in the sample require approximately 23 thousand seasonal workers in total. As at Monday 7 September, 76% of companies said their total seasonal labour requirements for the year has remained the same compared with week commencing 24 August (Figure 1).
- 21% of those who submitted a return, said that their total seasonal labour requirement had decreased. A large proportion of those who have reported a decrease said it was largely due to the season tailing off.

Figure 1: Changes in total seasonal labour requirements



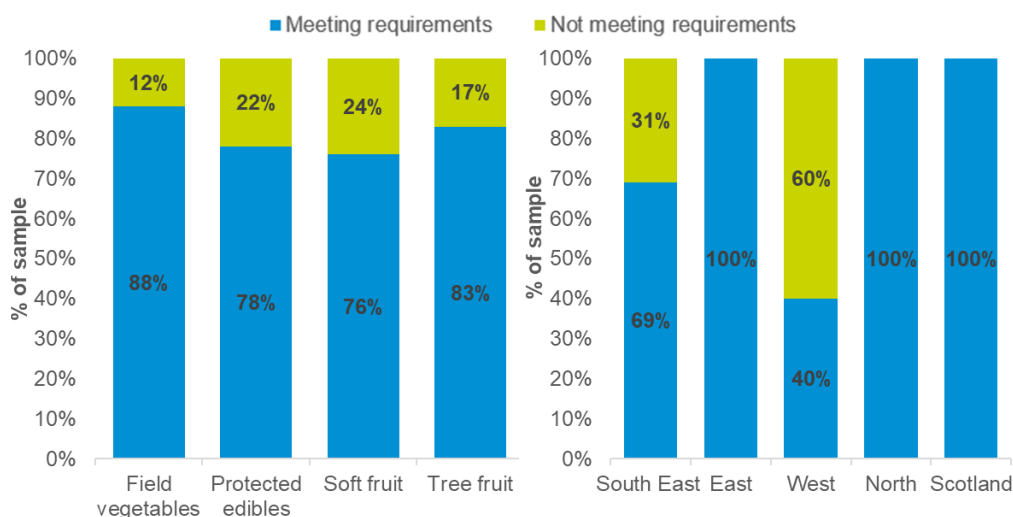
- 81% of companies who submitted a return have met their seasonal labour requirement as at Monday 7 September. This is compared with 76% as at 24 August (Figure 2).

Figure 2: Proportion of companies meeting their seasonal labour requirements



- Figure 3 shows the proportion of companies meeting their seasonal labour requirements broken down by region and sector. The majority of growers from the four sectors are meeting current requirements. The data shows that all companies that submitted a return from the East, North and Scotland have met their requirements, along with a high proportion of growers from the South East. 60% of growers from the West said that they are not meeting their requirements. It is worth noting that not all regions are represented by equal sample sizes.

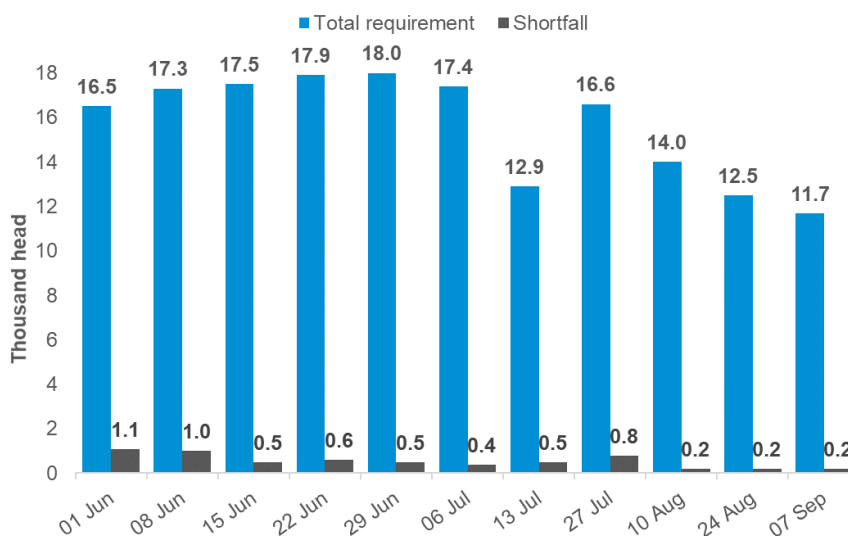
Figure 3: Proportion of companies meeting their seasonal labour requirements by sector and region



Source: AHDB

- 11.7 thousand seasonal workers were required as at 7 September by the 37 companies who submitted a return. As shown in Figure 2 above, 19% or 7 of those companies had not met this requirement. In total, these companies were short by just under 200 workers as at 7 September (Figure 4).

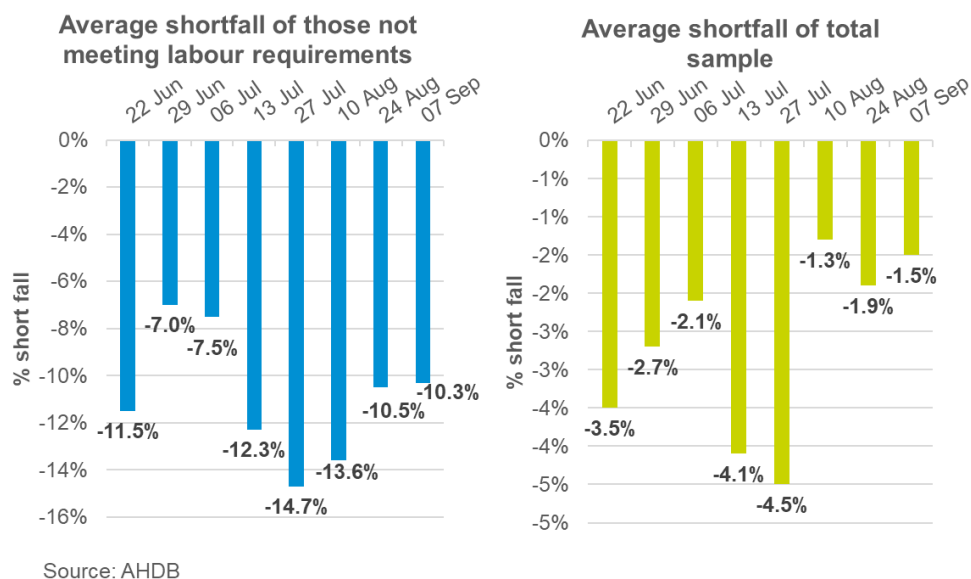
Figure 4: Total seasonal labour requirements and shortfall by week



Source: AHDB

- The average shortfall in seasonal labour of those companies who currently are not meeting requirements is 10.3% short (10.5% as at 24 August). Compared with the total labour requirement of the whole sample, the current shortage is 1.5% compared with 1.9% as at 24 August (Figure 5).

Figure 5: Percentage labour shortfall of those not meeting labour requirements and of the total sample

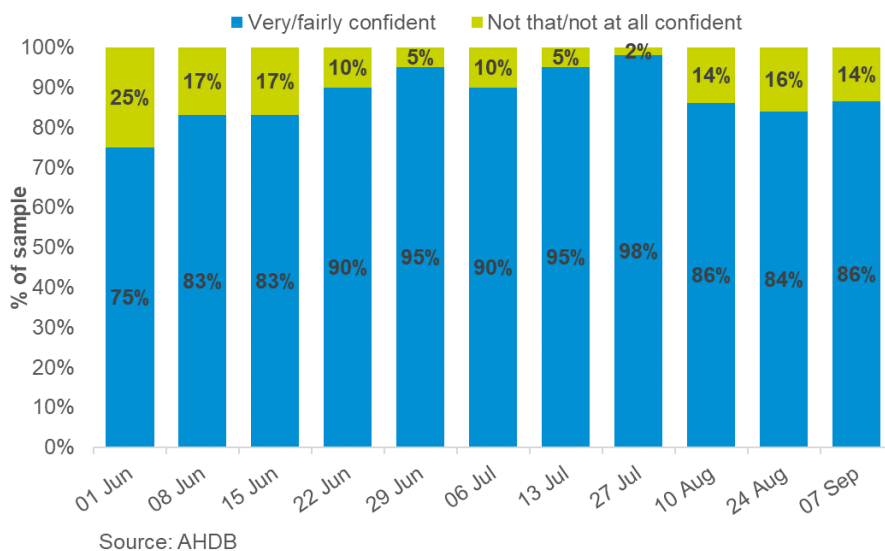


- For those companies who are currently experiencing a shortage in seasonal labour some have reported that their shortage is leading to additional cost, a strain on resources with staff working overtime, as well as delays in picking/ loss of crop.

CONFIDENCE IN SOURCING SEASONAL LABOUR

- Out of the 37 companies who submitted a response, 86% were either fairly or very confident that they will be able to source all seasonal labour that is required for the remainder of the season, relatively unchanged from week commencing 24 August (Figure 6).

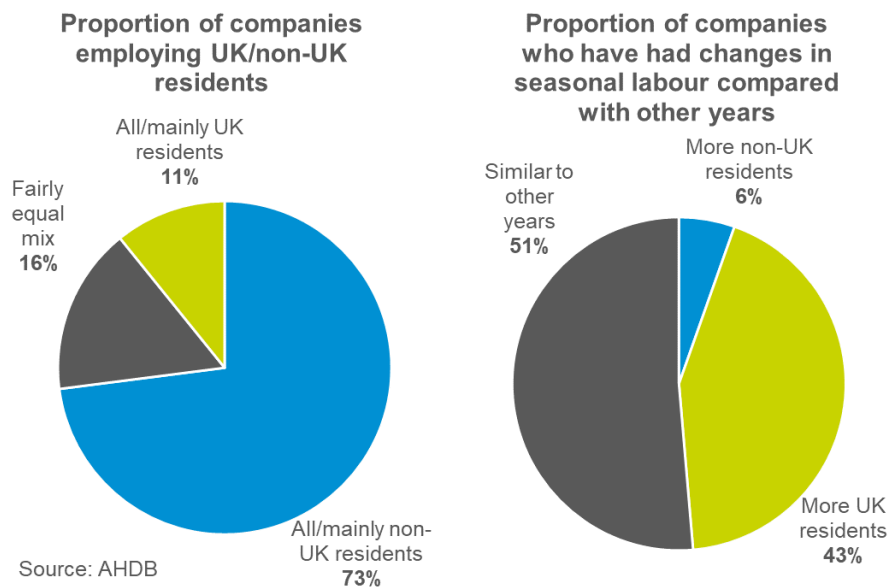
Figure 6: Confidence of companies in sourcing all required seasonal labour this season



DESCRIPTION OF SEASONAL LABOUR

- As at 13 July, contributors were asked a supplementary question around the nationality of the seasonal labour they employ, as well as whether there have been any changes this year compared with others due to COVID-19. 73% of companies' best described their seasonal workers as all/mainly non-UK residents, compared with 11% employing all/mainly UK residents. When comparing the split of workers to previous years, 51% of companies said it was similar to other years, while 43% of companies have employed more UK residents.

Figure 7: Description and changes to seasonal labour



GET INVOLVED

If you are an edible horticulture producer and would like to take part in the Horticulture Labour Barometer you can sign up directly via our helpline on hort.labour@ahdb.org.uk or Tel: 024 7527 1600. The team is available to answer and questions that you may have. All information provided is kept confidential, with all results aggregated and anonymised before release.