

Tyfu Cymru Labour Monitoring Survey 2020

In June 2020 Tyfu Cymru conducted a survey to better understand the current labour demands of commercial Welsh horticulture operations and to see if and how Covid-19 has impacted the labour requirements of these businesses.

Who did we survey?

The focus group for the survey were commercial edible producers in the Welsh horticulture sector. The project classifies potato production as an edible operation.

The survey was initially circulated via email on 19th June, followed by promotion on the project's social media platforms and a text service reminder near the closing date. In addition to the survey link, participants were invited to discuss the topic in more detail with the Tyfu Cymru team if necessary. This is part of the ongoing support that Tyfu Cymru provides to businesses engaged with the project. The survey closed on 8th July 2020.

Tyfu Cymru contacted 150 eligible businesses from the project database and received 51 responses (34% response rate) from across the sector. The responses came from a cross section of the industry - from small scale to large scale producers and both conventional and organic.

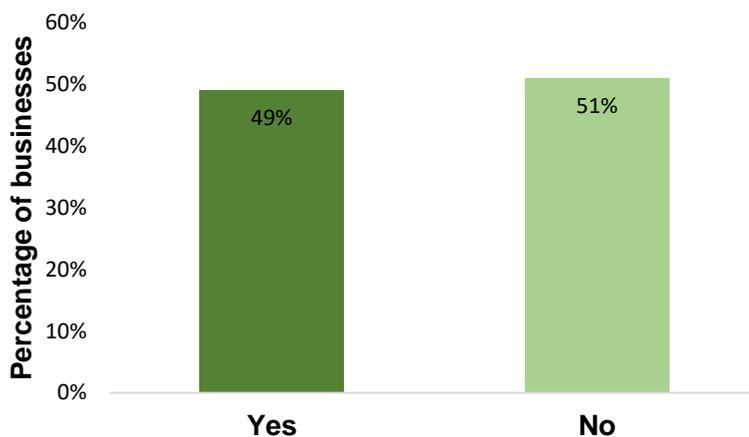
Survey results

The following results are based on the sample size of 51 businesses who responded to the Tyfu Cymru Labour Monitoring Survey in June/July 2020.

Labour Sourcing

- ▶ 49% of Welsh edible growers have sourced seasonal labour in 2020 (fig.1)

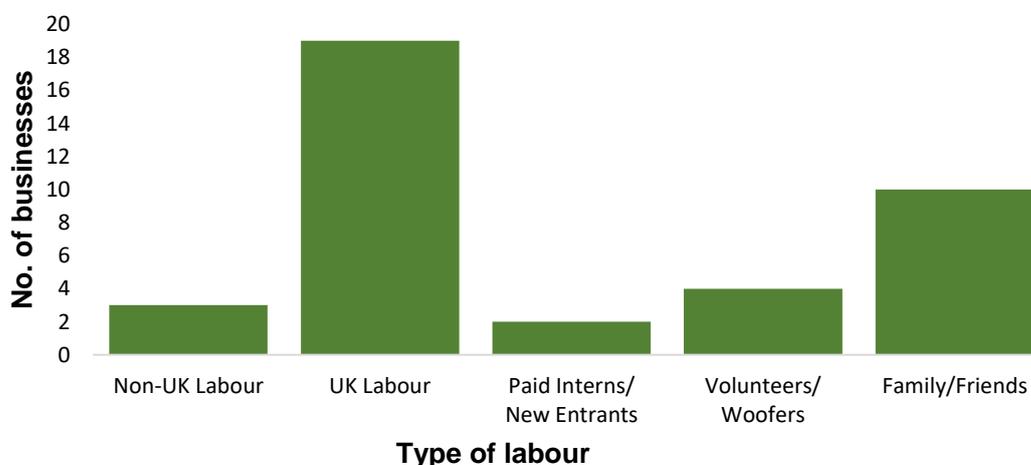
Figure 1. Percentages of businesses hiring seasonal labour in 2020



- ▶ Of the 25 businesses that have required seasonal labour, the breakdown of labour type is as below (fig.2). The most popular source of seasonal labour is 'UK labour' at 19 businesses (37%). The least popular source at 2 businesses is paid interns/new entrants (4%)

- ▶ 3 businesses (6%) hired non-UK seasonal labour

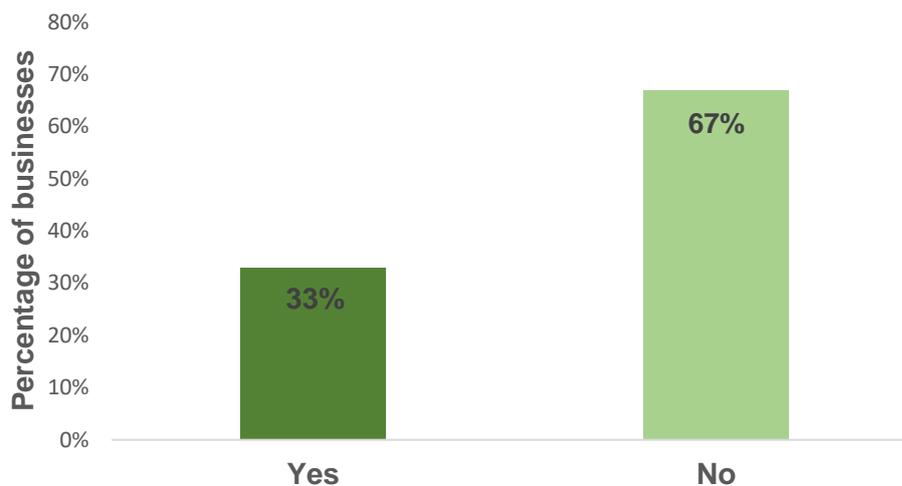
Figure 2. Type of seasonal labour hired in 2020



Business impact of Covid-19

- ▶ 13% of businesses have experienced Covid-19 related staff absence
- ▶ A third (33%) of businesses have experienced cost increases in 2020 as a result of Covid-19 (**fig.3**)

Figure 3. Percentage of businesses experiencing or predicting labour cost increases as a result of Covid 19



- ▶ The primary reasons for the increase in costs include:
 - PPE costs
 - Additional labour to cover staff absence
 - Change in selling strategy
 - Scaling up costs due to increase in demand
 - Increased supplier prices
- ▶ No issues with sourcing labour as a result of Covid-19 were identified

Lantra Skills Matching Service

- ▶ 1 in 4 businesses (24%) were aware of the Lantra Skills Matching Service

Contact Us

If you would like further information on the Labour Monitoring Survey or are an eligible business requiring support and advice please contact Tyfu Cymru at tyfucymru@lantra.co.uk All information provided is kept confidential and anonymised before release. Further project information can be found at www.tyfucymru.com