Briefing Note
The West Sussex Horticultural Sector – Strategic Overview and Priorities
(For: Lee Parker)

The full survey document is attached as "WSGA - Simpson Consulting - Report - FINAL - 6th February 2021".

This briefing note is intended to summarise the 70-page document, but please also take a look at the following sections in the main document which provide an excellent introduction to the sector and its challenges.

- *Executive Summary pp3-5*
- *Conclusion pp54-55*
- *Annex D; Planning Policy pp63-69*

1. Strategic Importance of the Sector

The 2021 WSGA–Simpson Consulting study confirms that horticulture is one of West Sussex's most productive and strategically significant industries:

- **Economic contribution**: ~£1bn annual sales; direct & indirect GVA ~£750m (c. 23% of UK horticulture value despite only 7% of national business numbers).

- **Employment**: ~10,100 FTE jobs (6,600 permanent; 3,500 seasonal).

- **Land use**: ~3,940 ha under cultivation – <2% of total county land, yet high productivity per hectare.

- **Specialisation**: Leading UK production of protected edibles (salads, herbs, leafy vegetables) and protected ornamentals.

- **Innovation**: High adoption of advanced glasshouse technology, sustainable water and energy systems, and agile market responses.

The sector's long history (150+ years) and concentration in the Chichester–Arun coastal plain form part of the county's economic "USP", alongside its linkages with the low-carbon, agri-tech, and food processing sectors.

2. Market Dynamics & Growth Drivers

- **Growing demand**: 75% of growers reported increased demand in their main markets in the year before the study.

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- **Consumer trends**: Rising interest in healthy eating, plant-based diets, home cooking, and gardening.
- **Food security**: Heightened focus on local production and reduced reliance on imports.
- **Environmental focus**: Strong consumer and retailer pressure for sustainable production, lower "food miles", peat reduction, and plastic recycling.

3. Opportunities for West Sussex

- **Import substitution**: UK horticulture can capture market share from overseas imports, especially if supported on labour supply and planning.
- **Cluster development**: Local concentration of specialist suppliers (irrigation, hydroponics, agronomy, green energy) offers scope for innovation hubs.
- **Low-carbon leadership**: Shared energy infrastructure (e.g. Combined Heat & Power, renewable generation) could create competitive advantage and investor interest.
- **Skills partnerships**: Stronger collaboration between growers, WSCC, colleges, and training providers to address specialist and technical skill gaps.
- **Tourism & branding**: Synergies with viticulture, visitor economy, and "Grown in West Sussex" branding.

4. Challenges & Risks

- **Labour & skills shortages**: Heavy reliance on seasonal migrant labour, difficulty recruiting locally, and gaps in STEM, engineering, and horticultural technical skills.
- **Planning constraints**: Nearly 40% of WSGA members report planning difficulties.
- **Competition**: Emerging large-scale, investor-backed horticulture in lower-cost UK regions, aided by new technology.
- **Climate change & resources**: Need for resilient water infrastructure and affordable low-carbon energy.
- **Market pressures**: Supermarket price competition; risk from cheap imports with lower environmental/phyto standards.

5. Local Policy Context

The sector features in Coast to Capital LEP's Strategic Economic Plan, LIS, and recovery strategies, but local authority strategies vary in emphasis:

- **WSCC Economic Growth Plan** – recognises horticulture's contribution and potential for innovation, digital, and green energy linkages.
- **Arun & Chichester plans** – identify horticulture as a key strength; emphasise HDAs and workforce issues.
- **Other districts** – limited direct reference to horticulture, signalling scope for stronger county-wide alignment.

6. Recommended WSCC Actions

1. **Champion the sector** – Position horticulture alongside other priority sectors in county-wide economic strategy and investment promotion.
2. **Facilitate skills pipelines** – Broker partnerships between growers, training providers, and schools; support apprenticeship schemes modelled on construction industry approaches.
3. **Support planning for growth** – Protect and enhance Horticultural Development Areas; expedite planning for water storage, renewable energy, and glasshouse infrastructure.
4. **Enable resource resilience** – Work with growers on shared energy and water initiatives; explore feasibility of energy hubs and private distribution networks.
5. **Strengthen cluster visibility** – Map and promote the horticulture–low carbon–agri-tech cluster to attract inward investment and R&D.
6. **Public awareness & branding** – Promote "Grown in West Sussex" as part of a food security, environmental, and local economic narrative.

References:
This briefing is based on the *West Sussex Growers' Association – Simpson Consulting* report (Feb 2021). The full report, including detailed statistics, sector analysis, and stakeholder perspectives, is attached as **Appendix 1** for reference.