Sector A: Agriculture, forestry and fishing

Summary

Livestock and dairy farming is far more important than arable production in the broader Lancashire area. In 2013, 83.8% of the total agricultural area in the county was classified under the temporary and permanent grassland or rough grazing headings (England = 48.6%).

The top grade farming land in West Lancashire means that the area is a significant producer of field vegetables and crops under glass/plastic. The farming land allocated to fruit and vegetable production in West Lancashire represents 94% of the Lancashire total (64% of the North West total).

In terms of employment, the 2013 DEFRA food and farming statistics estimate a total Lancashire workforce (which includes farmers, managers, employees and casual labour) of some 10,000 people or about 3.4% of the England total.

National results highlight that total income from farming in 2015 was £3.77 billion.

The Fleetwood fishing industry is nowadays quite modest in comparison to its heyday, but fish processing is still an important local industry that relies on supplies arriving by road from ports across the country.

In September 2015, there were seven fishing vessels over 10 metres in length, and 55 under 10 metres, that had Fleetwood registered as their administrative port.

Introduction

This article primarily uses a range of data sets derived from the Department for Environment, Food and Rural Affairs (DEFRA) website. Mention is also made of local estimates of gross value added (GVA) that have been obtained from the Office for National Statistics.

The fishing industry section uses the statistics section of the Marine Management Organisation's website for results of fishing vessel lists for vessels over and under 10 metres in length that are updated each month.

The article includes links to a number of businesses in Lancashire that either operate in this broad sector or support the activities of organisations working in the agriculture and forestry sector.

Agriculture in the UK reports and the agricultural price indices

The yearly Agriculture in the UK reports detail the national position regarding farming income, the structure of the industry, prices and productivity etc. Headline figures in the report show that total income from farming fell between 2014 and 2015 by a very substantial 29% (£1,526million), to give a total figure of £3.77 billion.

Among the vast amount of information in the yearly agriculture reports are figures that consider the UK's self-sufficiency position in food production. The food production to supply ratio is commonly referred to as the self-sufficiency ratio, which is calculated as farm-gate value of raw food production divided by the value of raw food for human consumption. The figures for 2015 reveal that the UK was 61% self-sufficient for all its food requirements and 75% for indigenous foods.

Table 1 UK self-sufficiency in food 2007- 2015

	2007	2008	2009	2010	2011	2012	2013	2014	2015
% of all food	60	60	59	61	64	63	60	62	61%
% of indigenous type food	73	73	72	75	78	77	73	76	75%

Source: DEFRA (Agriculture in the UK)

The monthly agriculture price indices reports track changes for various farm outputs such as crop products, and animal and animal products. It also includes input results for products consumed such as seeds, energy, feedstuffs, veterinary services, plant and machinery etc.

The government's series of agri-environment indicators monitor agricultural and environmental change in England. The wide range of indicators include direct payments made to farmers, product prices, farm size and rents, and fertilizer use etc,

Agricultural Land Classification

Agriculture represents the largest single land use in Lancashire and as well as its farming potential it is of considerable importance in terms of its role in safeguarding the environment and rural economy. The county has a large agricultural resource base that makes a major contribution to the nation's food supply. The types of farming supported cover a remarkably wide range from intensive horticulture and general cropping in the coastal plains, dairying in the other lowland areas to cattle and sheep rearing in the upland regions. A significant proportion of these uplands are designated as "less favoured areas", highlighting the limitations facing some farming enterprises in the county.

Table 2 Agricultural Land Classification

DEFRA Grade	% for Lancashire	% for England
Grades 1 and 2	14.6	16.9
Grade 3	30.5	48.2
Grade 4	25.7	14.1
Grade 5	19.7	8.4
Non-agricultural	1.1	5.0
Urban	8.5	7.3
Total	**100.0**	**100.0**

Source: DEFRA

Agricultural land quality varies across the sub-region (Table 2). It is classified into five grades: grade one is best quality and grade five is poorest quality. A number of consistent criteria are used for assessment that include climate (temperature, rainfall, aspect, exposure, frost risk), site (gradient, micro-relief, flood risk) and soil (depth, texture, stoniness).

The most productive land in Lancashire is concentrated in the west of the county (mostly in the Fylde and West Lancashire) where much is classified by DEFRA as top grades 1 and 2, capable of growing a very wide range of agricultural and horticultural crops. Indeed, these areas represent the largest concentration of top quality farmland in the west of Britain. Elsewhere land quality is less favourable: over 42% of the county's land is classified as being of poorer quality grades 4 and 5 against 21% nationally. These poorer grades of land are best suited to grass crops or rough grazing. The Lancashire maps section of our website has an 'environment and conservation section' that includes a map of the agricultural land classifications.

Green belts are an enduring element of national planning policy and once designated, they are intended to be maintained as far as can be seen ahead. They are not inviolable but can only be altered in exceptional circumstances. Much of the top grade farmland in the county is also classified as green belt to provide additional protection against development.

The DEFRA urban settlements designation however emphasises some of the limitations of the land classification results. For example, Rossendale district has no land classified as urban under the DEFRA figures whilst a number of other urban sites in Lancashire are also excluded. Some of these have developed over the years as settlements have grown, especially in Central Lancashire, but others were just unfortunately omitted from the original DEFRA figures.

The agricultural land classification results are therefore useful in indicating the general picture in the county, but the actual local authorities values listed in appendix at the end of this article should be treated with some caution.

Rural land classification

Lancashire county council's Business Intelligence Team has produced an urban and rural definitions article that has tables and maps that use official DEFRA definitions to categorise different types of small areas in the authority as being 'urban: major conurbation', 'urban: city and town', 'rural: town and fringe' or 'rural: village and dispersed'.

The economic value of agriculture, forestry and fishing

Gross Value Added (GVA) is generally regarded as the best measure of the sum of economic activity within an area. Local estimates of gross value added (GVA) are published by the office for national statistics that are split by various industrial sectors. The sectors include one covering agriculture, forestry and fishing, and the estimates of GVA for 2014 reveal that, agriculture, forestry and fishing accounted for £221 million in the 14-authority Lancashire area (regional GVA NUTS2).

Farm type, farmed area, livestock and agricultural employment (2013)

Results from the Department for Environment, Food and Rural Affairs: June Survey of Agriculture and Horticulture were in 2013 published down to the local authority area level. Figures are available individually for 12 of the 14 local authorities within the broader Lancashire area whilst the other two areas share amalgamated results. Blackpool is predominantly an urbanised area with a very high population density, and has only a small amount of farmland. Its survey results have therefore been added to the figures for Fylde district.

The following three tables have the results for 2013, and only include commercial holdings. Over 40% of registered holdings in England have activity below the commercial thresholds, but non-commercial activities have only a very small effect for crops, sheep, pigs etc. (less than 1% of national totals are excluded). It is for the number of holdings and employment figures where there are marked effects, but this is expected as even the smallest holdings must have at least one part-time principal farmer. In reality, as this work is often a hobby or spare-time activity, it is considered justifiable to exclude them from the commercial estimates.

The updates for 2011 and 2012 used a smaller survey sample size, so district-level results were not available for these years.

At the national level, between 2010 and 2013, there was a small increase from 8,887 to 9,086 thousand hectares classified as utilised agricultural area. Figures for total crops, sheep and pigs increased over the three-year period, but fruit and vegetables, poultry and cattle numbers saw small reductions. The total labour forces increased from 293,000 in 2010 to 296,000 in 2013, and some of these national changes were mirrored at the Lancashire level.

The Lancashire results

Farm holdings and farmed area

The easily cultivated peat, light alluvial and sandy soils in the West Lancashire area form a large area of top grade farmland that supports intensive arable cropping. Also the proximity of large urban markets in the towns and cities of the North West encouraged the growth of an important horticultural industry. The area is a significant producer of field vegetables and crops under glass/plastic. The farming land allocated to fruit and vegetable production in West Lancashire represents 94% of the Lancashire total (71% of the North West total), with the neighbouring authority of South Ribble accounting for the only other amount of note in the county. West Lancashire also has by far the largest amounts of land allocated to cereal and arable production in Lancashire.

Livestock and dairy farming represent the major agricultural land use in the county. Ribble Valley and Lancaster districts in particular have substantial farmed areas classified under the grassland headings. In 2013, 83.8% of the 14-authority Lancashire area's total agricultural land was classified under this heading (England = 48.6%).

Ribble Valley has by far the largest number of farm holdings in the county, 632 or 18.1% of the total. Together with Lancaster, West Lancashire and Wyre, these four authorities account for 55.9% of Lancashire's farm holdings and 64.7% of total famed area.

Table 3 Farm holdings, farmed area and type of agricultural holding, 2013

	Total number of holdings	Farmed area by type (hectares)				
		Farmed area	Cereals	Arable	Fruit and Veg	Grassland (ii)
Blackburn with Darwen	116	5,654	0	0	#	5,506
Blackpool and Fylde (i)	171	11,183	2,092	976	#	7,651
Burnley	97	6,124	0	#	#	5,862
Chorley	256	13,859	935	417	28	11,912
Hyndburn	110	4,160	0	0	0	4,062
Lancaster	511	45,204	494	391	4	42,829
Pendle	235	10,858	#	#	#	10,564
Preston	196	8,814	283	133	#	8,143
Ribble Valley	632	48,579	184	144	#	46,892
Rossendale	195	8,675	#	#	#	8,535
South Ribble	167	6,941	826	299	141	5,380
West Lancashire	406	23,207	9,425	3,815	3 ,310	5,431
Wyre	406	22,889	2,594	1,154	33	18,336
Lancashire-14 area	**3,498**	**216,145**	**16,833**	**7,329**	**3,516**	**181,103**
North West	12,198	908,915	89,782	34,892	5,211	744,126
England	102,836	9,086,480	2,492,296	1,327,988	128,094	4,412,696

Source Department for Environment, Food and Rural Affairs: June Survey of Agriculture and Horticulture
Data suppressed to prevent disclosure of information about individual holdings (or data unavailable because its calculation requires suppressed data).
(i) Blackpool is a highly urbanised authority with only a small amount of farm land. The results therefore are not published separately but are added to the figures for Fylde district.
(ii) Grassland includes temporary grass under five years old, permanent grass over five years old and sole right rough grazing
Figures are based on a sample survey with estimates made for those not surveyed or responding.

Livestock on commercial holdings

The dominance of Lancaster and Ribble Valley is apparent as areas with substantial numbers of cattle and sheep. Blackpool and the Fylde, along with Wyre are important locations for pig farming and contain 57.3% of all pigs in the county. Poultry production is highly concentrated in a number of authorities in Lancashire with both Chorley and Wyre having figures in excess of half a million. An example of a local producer is J Rainford & Sons in Chorley.

Table 4 Livestock on commercial holdings, 2013

	Cattle	Sheep	Pigs	Poultry
Blackburn with Darwen	4,080	14,085	240	7,098
Blackpool and Fylde (i)	16,545	20,054	20,390	186,756
Burnley	2,788	26,135	75	2,959
Chorley	11,362	27,739	1,333	619 ,442
Hyndburn	3,193	14,534	#	163,642
Lancaster	51,939	178,324	4,558	130 ,890
Pendle	8,998	45,356	1,188	2,622
Preston	17,420	15,535	3,022	291,710
Ribble Valley	43,291	220,924	1,901	233,882
Rossendale	4,004	38,367	66	13,424
South Ribble	11,790	8,663	3,070	359,473
West Lancashire	7,321	12,575	7,434	417,248
Wyre	34,961	48,697	10,318	531,952
Lancashire-14	**217,693**	**670,987**	**53,594**	**2,961,098**
North West	932,869	2,871,188	156,962	9,157,533
England	5,344,652	14,921,639	4,065,928	120,504,242

Source Department for Environment, Food and Rural Affairs: June Survey of Agriculture and Horticulture

Data suppressed to prevent disclosure of information about individual holdings (or data unavailable because its calculation requires suppressed data).
(i) Blackpool is a highly urbanised authority with only a small amount of farm land. The results therefore are not published separately but are added to the figures for Fylde district.
Figures are based on a sample survey with estimates made for those not surveyed or responding.

Agricultural employment

Since the Second World War, agriculture in Lancashire and across the UK has become bigger, more intensive and more specialised. Output and productivity have increased enormously and in real terms, food prices have in general fallen. The swing from arable to less labour intensive grass in the local production pattern, increased mechanisation, improved production techniques, more efficient use of labour, the loss of holdings through urban developments and the availability of greater financial rewards to employees in jobs outside the industry all contributed to a long-term fall in agricultural employment.

Nowadays, the most up-to-date local employment results are the 2013 DEFRA food and farming statistics. They estimate a total Lancashire workforce (which includes farmers, managers, employees and casual labour) of some 10,000 people or about 3.4% of the England total. The intensive land use farming in West Lancashire leads to the demand for regular and casual workers to supplement the numbers of farm owners, spouses and salaried managers. It is the only Lancashire authority with over 2,000 people classified as working in agriculture, and the only one with more regular and casual workers than farmers, their family and managers. Lancaster, Ribble Valley and Wyre also had employment numbers in excess of 1,000. Together with West Lancashire, these four authorities accounted for 62.6% of agricultural employment in the Lancashire-14 area.

Table 5 Agricultural employment, 2013

		Farmers, partners, directors and spouses		Salaried Managers	Regular workers		
	Total	Full-time	Part-time	Full-time	Full-time	Part-time	Casual workers
Blackburn with Darwen	227	113	90	#	14	10	#
Blackpool and Fylde	529	178	126	15	103	60	47
Burnley	194	77	71	#	32	14	#
Chorley	700	238	216	19	131	73	23
Hyndburn	187	76	80	#	13	18	#
Lancaster	1,315	549	409	22	149	114	72
Pendle	392	170	172	#	21	29	#
Preston	634	196	171	18	161	77	11
Ribble Valley	1,470	607	501	22	132	145	63
Rossendale	334	107	187	#	#	26	14
South Ribble	533	210	113	13	86	63	48
West Lancashire	2,299	534	236	79	732	237	481
Wyre	1,170	477	310	23	153	130	77
Lancashire-14	**9,983**	**3,532**	**2,681**	**211**	**1,728**	**995**	**836**
North West	31,939	12,438	9,316	664	4,539	2,868	2,114
England	295,563	88,188	83,435	10,585	46,612	27,540	39,203

Source Department for Environment, Food and Rural Affairs: June Survey of Agriculture and Horticulture
Data suppressed to prevent disclosure of information about individual holdings (or data unavailable because its calculation requires suppressed data).
(i) Blackpool is a highly urbanised authority with only a small amount of farm land. The results therefore are not published separately but are added to the figures for Fylde district.
Figures are based on a sample survey with estimates made for those not surveyed or responding.

Historic trends

The June agriculture survey has results that provide a detailed understanding of how the industry has changed over a long period of time. The county/unitary authority spreadsheet has results from the early part of the 20th Century to the most up-to-date available. The figures chart, amongst other things, changes in the hectarage of crops and main animal types over the years. Up to 1955, the local results are under the 'Lancaster' heading, then Lancashire from 1965 onwards. Local Government reorganisation in 1974 led to boundary changes therefore the Lancashire figures are not directly compatible over the long-term. The results however give an indication of how land-use, animal types and numbers have changed over the years.

Food Standards Agency

The government's Food Standards Agency contains a wealth of information on registered businesses involved in the handling, preparation or producing of animal products.

Other agricultural employment

Examples of agricultural-based enterprises across Lancashire include Dawndew Salad Ltd, Poulton-le-Fylde based commercial salad growers; Dewlay Products Ltd, Garstang dairy farmers and traditional cheese manufacturers; Dunbia (Sawley) beef abattoir and beef-deboning plant, distributing local beef and lamb products throughout the UK; Flavourfresh Solfresh Group of Banks, West Lancashire, leading UK salad producer; George Speight and Sons Ltd, long-established Lancaster based supplier of fresh and ready prepared fruit and vegetables; and Huntapac Produce Ltd, growers, packers and distributors of organic and conventional root vegetables, brassicas and salads.

Len Wright Salads in Tarleton grow in excess of 500 acres of salad crops that include celery and lettuce. Nowadays, a very important aspect of the company is the marketing side of the business. It sources produce from a number of local growers to improve the company's ability to respond effectively to the demands of the major supermarkets and food processors. This also facilitates savings for growers from product specialisation, and the development of economics of scale. Also in the locality is Bryans Salads that suppliers of pre packed salads and vegetables. The propagation of plants is classified within the agriculture sector and the West Lancashire area is home to a number of sites that grow bedding and other plants under glass. Lovania Nurseries Ltd is one of the UK's leading plant growers, wholesalers, and contract growers, producing over 65 million bedding, alpine, flowering and bulb pot plants each year. This long-established company operates from over 42 acres of glasshouses across a number of sites in the Tarleton area.

Fiddler's farm is an example of a Lancashire agricultural business that has expanded into food processing which is a separate industrial activity that is actually classified within the manufacturing sector. Potatoes grown on the family farm are used to make a range of crisps.

Drinkwater's mushrooms, as the name suggest, is a specialist grower and packager of mushrooms. Butler's Cheeses has enjoyed success with its Blacksticks Blue cheese, whilst Singleton's in Longridge is a very well established local cheese manufacturer. Carron Lodge, Preston is another award-winning cheese manufacturer.

Peter H Smith is a Preston company of flower wholesalers that has been in business since the 1920s, whilst Quantil, near Ormskirk, offers an extensive range of plants and seeds.

Also of note is Golden Acres in West Lancashire. The website states that they are Europe's largest manufacturer of own label, premium dry pet foods.

South West Lancashire Farmers in Skelmersdale was established in 1921, and is a farmer-owned and controlled agricultural merchants, supplying animal feeds, fertilisers, seeds and other farm requisites and also undertake grain trading, throughout Lancashire and South Cumbria.

Shepherds Diary Ltd is classified under both the raising of dairy cattle, and also the wholesale of dairy products, eggs and edible oils and fats.

Off-farm agricultural employees

Generally, the industry remains highly fragmented and most agricultural enterprises are small, family-owned concerns. The sector does however also support considerable employment in off-farm supply industries like auction marts, produce packaging, haulage, agricultural machinery manufacture and servicing, agro-chemicals and prepared animal feeds and is the basis of local dairy processing and meat products sectors. In business terms it is a fairly stable sector with both unusually low rates of new business formation compared with other industries and high business survival, though the long-term trend towards the consolidation of holdings is continuing.

Kirkham Prison

Kirkham prison in Fylde district is spread over 180 acres and a substantial part of the site is used for agriculture and horticulture. There is a farm shop open to the public and the Kirkham Enterprises web page provides information on the prison's commercial services and role in the local community.

General characteristics

There is a growing interest in good quality, locally produced food products and Lancashire has long-established strengths in this area amongst both producers and retailers that source from local suppliers. Marketing and general business support facilities are in place to promote locally produced food and drink products, and the Forest of Bowland name has a strong association with added- value meat and milk products

Today, modern agriculture is under considerable pressure for change. It is being shaped by many of the same technologies transforming other industries, but is also subject to unique political and economic constraints of its own. It is not only expected to produce inexpensive food but also to sensitively manage the rural landscape, the welfare of farmyard animals and look after the health of consumers.

A number of the salad growers in West Lancashire are large companies that have major contracts with the supermarkets and food processors. These businesses however tend to have low public profiles since their names are not associated with their produce at the point of sale to the public. The large-scale mass market production of salad crops is a Lancashire industry that has only limited national and international public recognition.

The European Union scheme for designating areas closely linked with particular food products only includes Beacon Fell traditional Lancashire cheese as a designation applicable to a part of Lancashire.

The long opening hours of the major supermarket chains mean that growers have to extend their business and quickly respond to just-in-time orders for dispatch to distribution depots across the country. Margins are extremely tight therefore profits are obtained through very large volumes, product specialisation and in some cases innovation. There is the additional need to provide a range of seasonal products throughout the year. Growers are becoming ever larger, or work in co-operation, so that they can satisfy large orders with tight profit margins and tough supply criteria. Just-in-time ordering means that firms have to accurately predict future seasonal variations in demand and be able to quickly buy in additional supplies from around the country or abroad to satisfy major contracts.

Major supermarkets in particular have substantial buying powers and set the agenda on price, quality, size, order response times and production standards etc to satisfy their strict requirements.

All businesses, regardless of the sector within which they operate, exist within a business environment that can be better understood by the considering the interaction of a set major competitive forces. Professor Michael Porter was instrumental in developing the renowned five forces model, and the forces are summarised under the following headings:

1. Competitive Rivalry
2. Power of suppliers
3. Power of buyers
4. Threats of substitutes
5. Threat of new entrants

The power of buyers appears to be the dominant driving force within the agriculture sector, but the growth in the size of some of the agricultural firms in the county, formal and informal co-operative agreements, plus product innovation and general economies of scale etc, may help to counteract some of the strength of buyers. Major multi-national buyers are perfectly aware of changing market forces and the move towards fewer but larger suppliers. They will have their own future strategies that may include buying up suppliers or strengthening contractual arrangements.

In West Lancashire in particular, much of the rural area is classified as green belt land which severely restricts development. The designation does protect farmland, but it also presents challenges when agricultural businesses submit plans for new buildings to achieve economies of scale.

The financial returns in a number of agricultural sectors have forced many farm enterprises to look more carefully at diversification as a means of improving the viability of their core farm businesses. In some cases this can take the form of developing non-agricultural activities such as the provision of and accommodation facilities to encourage tourism, sport, school visits, recreation or other outdoors activities. Others look to move up the value chain by entering directly into food retail, local dairy processing and encouraging visitors to a farm shop by providing a range of other retail activities. Others use innovative marketing and quality assurance schemes to create or to raise brand awareness. Diversification can also be achieved by moving into organic production, both of livestock and crops, or offering innovative new uses for former farm land or buildings.

Forecasts for the industry's future prospects are always open to uncertainty, largely because of the many unique imponderables it faces. In particular, underlying trends are heavily shaped by exchange rates and world commodity prices that are themselves difficult to forecast. Moreover, as circumstances over the years have all too dramatically indicated, ad hoc events such as weather conditions or disease outbreaks can be highly disruptive and can push incomes well above or below underlying trends in individual years.

Myerscough College

Myerscough College has its main campus at Bilsborrow some six miles to the north of Preston. The college offers a variety of land-based courses that include arboriculture, countryside and environment, horticulture, landscape, and fish husbandry.

Forestry

The 2013 county level crop areas/ livestock numbers/ labour force figures on the Defra website, confirm that 3,984 hectares or 1.9% of the total farmed area for the broader Lancashire area were classified as farm woodland. This compares with an England average of 3.7%. There are other hectares in Lancashire given over to woodland that are not classified as farmed area. These include woodland at Gisburn Forest, Longridge Fell and Grindleton Fell.

Gisburn Forest is the responsibility of the Forestry Commission, and covering 1,245 hectares is the largest forest in Lancashire. The commission has a small presence in Lancashire in terms of the forests they own and manage, in comparison, for example, to the neighbouring county of Cumbria, but their policy, grants and regulations function is in no way diminished.

The Woodland's Trust website lists a large number of woods in Lancashire that are open to the public. Woodland is defined in UK forestry statistics as land under stands of trees with a canopy cover of at least 20% (25% in Northern Ireland), or having the potential to achieve this. The definition relates to land use, rather than land cover, so integral open space and felled areas that are awaiting restocking are included as woodland.

The Lancashire Woodlands Project encourages the sustainable management of Lancashire woodlands.

Woodlands from waste is an innovative partnership between Global Renewables, Lancashire County Council and Blackpool Council, with funding from the Forestry Commission, to create new woodlands for Lancashire.

Logs Direct is based in North Lancashire, and supplies quality wood logs, fuel and kindling to homeowners across the UK.

P. Irving & Sons Ltd, is a well established traditional sawmilling business in Carnforth. All the Conifer saw logs processed are from around Northern England and Scotland. The Forest Stewardship Council has certified the company as a responsible supplier of timber products

Major landowners in Lancashire

The Grosvenor Estate is a portfolio of businesses, rural estates and other assets owned by trusts on behalf of the Duke of Westminster and the Grosvenor family. The portfolio includes the Abbeystead Estate which comprises 23,500 acres either side of the River Wyre and with the village of Abbeystead at its heart. There are said to be over 600 acres of woodland on the estate.

The Duchy of Lancaster is a unique portfolio of land, property and assets held in trust for the Sovereign in His or Her role as Duke of Lancaster. It has an historic link with the County Palatine of Lancashire dating back to 1265. Lands and properties are administered in five separate units known as Surveys. The Lancashire Survey consists of five agricultural estates located between Preston and Lancaster, covering a total area of 4,650 hectares (11,500 acres). The Duchy is also the major owner of foreshore in North West England between the centre point of the River Mersey and Barrow-in-Furness. In total, the landed interests in Lancashire are said by the Duchy to extend to just over 40,600 hectares (100,000 acres), and comprise all the holdings in agriculture, residential and commercial property, manorial interests and foreshore.

In addition to local reservoirs, United Utilities owns some 57,000 hectares of water gathering land in the North West that includes a number of sites in Lancashire that are open to the public. .

The fishing industry in Lancashire

Historical context

The advent of rail transport from the mid-1830s onwards, and the determination of a local land-owner to build a new town, facilitated the rapid development of the port of Fleetwood and the accompanying large-scale fishing industry.

Records of employment statistics going back to 1929 suggest that at the time, the fishing industry provided direct employment for some 2,650 people or nearly a quarter of Fleetwood's insured employees. Some modest decline over the next decade allied to growth in other sectors of activity reduced this dependency to about a fifth of employees by 1939.

The industry's post-war peak in direct employment in 1950 of some 2,500 employees represented about 15% of the total insured local workforce in Fleetwood. However, as well as providing direct employment, as a primary industry fishing also supported many jobs in associated industries such as shipbuilding and marine engineering, mechanical handling equipment, rope, twine and net manufacture, wooden containers and baskets, fish processing and ice for deep-sea trawlers. Indeed, for every direct job in fishing in Fleetwood, there were reckoned to be two associated shore-based jobs.

For three decades post-1945 the port of Fleetwood was largely dependent on the Icelandic fishing grounds and had a substantial deep-water fleet of large vessels landing major supplies of fish, particularly cod. At its peak, fish landings in Fleetwood by British and foreign vessels were about 70,000 tonnes per annum. Over much of the 1950s and 1960s modernisation of the fleet and the gradual substitution of medium-sized for smaller boats led to a steady and persistent fall in employment in the industry, but serious contraction followed only in the aftermath of the Icelandic fishing dispute in the mid-1970s. The industry had come to depend on Icelandic waters for the bulk of its catch: the dispute over fishing grounds and the subsequent restriction on British vessels in Icelandic waters had very severe effects and fish landings and employment plummeted as the industry underwent a massive contraction.

Nowadays, fish landings are supplemented by supplies brought in overland from other ports across the country for auction in Fleetwood, or for sale direct to local fish processors. There remains an important fish processing sector in Fleetwood and other parts of Lancashire, whilst the fish landing and vessel numbers reveal an industry that still maintains an important level of activity. Two examples of important local fish processors are AM Seafoods Ltd and Neve Fleetwood.

The Associated British Ports website states that Fleetwood has an important fish-auction hall that handles local catches and fish brought overland from Scottish and other ports, destined for local receivers.

The UK sea fisheries statistics publication

The Marine Management Organisation was established to contribute to sustainable marine development and promote the government's vision for clean, healthy, safe, productive and biologically diverse oceans and seas. The organisation's responsibilities include managing the UK fishing fleet capacity and UK fisheries quotas. The organisation's website lists recent editions of the UK sea fisheries statistics publication.

The 2014 edition of the report states that there were 11,845 fishermen of which 5,367 were based in England. UK vessels landed 756,000 tonnes of sea fish (including shellfish) into the UK and abroad with a value £861 million. This represented a substantial 21% increase in quantity and a 16% increase in value in comparison to the previous year. The three Scottish ports of Peterhead, Lerwick and Fraserburgh accounted for 52% by quantity and 37% by value of all landings by UK vessels in to the UK.

Local details in the report are that:

- Members of the Fleetwood Fish Producers organisation had 25 vessels in 2014.
- The organisation landed 10.3 thousand tonnes of fish that had a value of £28.4 million. This represented 3.3% of the UK total of £861m. The locations for the fish landings by the organisation's vessels are unknown.
- The Fleetwood Fish Producers organisation landed £26.6m of demersal fish (occupy the sea floors), £1.2m of pelagic (neither close to the bottom nor near the shore) and £500,000 of shellfish.
- 99 fishermen were allocated to the administrative port of Fleetwood. This administrative area covers fishermen along the North West coast.

Fishing vessel lists

The statistics section of the Marine Management Organisation's website contains fishing vessel lists for vessels over and under 10 metres in length that are updated each month. The lists detail the number of vessels that have Fleetwood as their 'home' or 'administrative' port. Table 6 highlights the number of vessels that classify Fleetwood as their 'administrative port.

Table 6 UK and Fleetwood registered vessels (administrative port), September 2011 to September 2015

Port	Over 10 metres					Under 10 metres				
	2011	2012	2013	2014	2015	2011	2012	2013	2014	2015
Fleetwood[1]	**8**	**9**	**9**	**8**	**7**	**66**	**63**	**60**	**55**	**55**
United Kingdom	1,309	1,308	1,294	1,268	1,260	4,385	4,222	4,254	4,277	4,350

Source Marine Management Organisation: fishing vessel lists
[1] Where Fleetwood is the administrative port.

The figures for each September over the last five years reveal a steady decline in vessel numbers over 10 metres at the national level, but the last three years saw a small national rise in vessels under 10 metres. At Fleetwood however, the past year saw one fewer larger vessel and no change in the number of smaller vessels.

In addition to their administrative port listing, vessels are also allocated to a home port. For larger vessels, the two are often the same, but for smaller vessels the two may be different. Of the 55 vessels under 10 metres in table 2, four had Lancaster as the home port, 11 had Morecambe, four were allocated to Lytham St. Annes and one to the Lune Estuary. A number also had home ports in other parts of the North West.

Approved fishery products and live bivalve molluscs establishments

For a complete list of firms in this sector please visit the Food Standards Agency website. European Union member states must give approval to establishments handling, preparing or producing products of animal origin. Countries publish lists of these establishments under separate sections each corresponding to a different food sector. In the Business and Industry section of the agency's website, there is a fish and shellfish section that has a spreadsheet of approved fishery products and live bivalve molluscs establishments in England. Firms are listed by district authority boundary that allows the Lancashire results to be identified. The businesses in the Fleetwood area are listed under the Wyre district heading, whilst a number of other Lancashire districts have firms listed on the site. Please also see the section of the website on shellfish monitoring.

Other fishing-related activities/websites

A cross-industry seafood body working with fishermen, processors, wholesalers, and seafood farmers etc., is the Sea Fish Industry Authority (Seafish) that promotes good quality, sustainable seafood.

The North Western Inshore Fisheries and Conservation Authority is the relevant body for regulation of inshore fisheries.

Appendix 1. Additional useful links/ sources of funding

The website for the Rural Development Programme for England has a projects section that details recent schemes that have received funding. Typing 'Lancashire', into the project search box reveals a number of commercial and non-commercial developments that have been undertaken in rural parts of the county.

Large sections of rural Lancashire are within the boundaries of either Arnside/Silverdale Area of Outstanding Natural Beauty or the Forest of Bowland Area of Outstanding Natural Beauty. DEFRA issue the statistics detailed before broken down by AONB as well as local authority, and these show that the areas are mostly used for grazing. The number of sheep in the Forest of Bowland equates to 47% of the Lancashire total .It also appears that much of the Ribble Valley production of poultry takes place within the AONB.

The Pennine prospects area covers a large section of rural East Lancashire. The organisation has secured funding for a range of heritage, landscape and community projects.

Lancashire County Council Countryside Service website highlights, amongst other things, the two country parks in the county that are managed by the service.

Natural England website details the geology of the broader Lancashire area.by a selection of distinct areas.

Appendix 2 Agricultural Land Classification

Agricultural Land Classification (ALC)

		Grade 1	Grade 2	Grade 3	Grade 4	Grade 5	Non-agricultural	Urban
Burnley	ha	0	0	1,052	3,691	4,801	13	1,514
	%	0.0	0.0	9.5	33.3	43.4	0.1	13.7
Chorley	ha	1,302	384	12,268	2,257	2,525	275	1,279
	%	6.4	1.9	60.5	11.1	12.4	1.4	6.3
Fylde	ha	0	7,736	5,524	349	0	939	1,748
	%	0.0	47.5	33.9	2.1	0.0	5.8	10.7
Hyndburn	ha	0	0	203	4,822	681	0	1,593
	%	0.0	0.0	2.8	66.1	9.3	0.0	21.8
Lancaster	ha	0	625	21,331	15,495	16,512	0	2,609
	%	0.0	1.1	37.7	27.4	29.2	0.0	4.6
Pendle	ha	0	0	866	10,453	3,993	0	1,624
	%	0.0	0.0	5.1	61.7	23.6	0.0	9.6
Preston	ha	0	117	10,930	498	217	0	2,497
	%	0.0	0.8	76.7	3.5	1.5	0.0	17.5
Ribble Valley	ha	0	0	15,265	24,770	16,247	1,770	396
	%	0.0	0.0	26.1	42.4	27.8	3.0	0.7
Rossendale	ha	0	0	0	6,401	7,388	16	0
	%	0.0	0.0	0.0	46.4	53.5	0.1	0.0
South Ribble	ha	286	963	7,257	740	0	0	2,053
	%	2.5	8.5	64.2	6.5	0.0	0.0	18.2
West Lancashire	ha	20,390	4,408	4,652	1,907	116	65	3,054
	%	58.9	12.7	13.4	5.5	0.3	0.2	8.8
Wyre	ha	0	8,367	12,088	2,532	2,963	60	2,290
	%	0.0	29.6	42.7	8.9	10.5	0.2	8.1
Lancashire (12 districts)	**ha**	**21,978**	**22,601**	**91,435**	**73,914**	**55,444**	**3,139**	**20,658**
	%	**7.6**	**7.8**	**31.6**	**25.6**	**19.2**	**1.1**	**7.1**
Blackburn with Darwen	ha	0	0	1,299	4,736	4,872	180	2,614
	%	0.0	0.0	9.5	34.6	35.6	1.3	19.1
Blackpool	ha	0	188	548	0	0	31	2,691
	%	0.0	5.4	15.9	0.0	0.0	0.9	77.8
Lancashire (14 authorities)	**ha**	**21,978**	**22,789**	**93,282**	**78,650**	**60,316**	**3,350**	**25,963**
	%	**7.2**	**7.4**	**30.5**	**25.7**	**19.7**	**1.1**	**8.5**
North West	ha	29,133	73,899	480,952	275,175	355,588	49,355	148,867
	%	2.1	5.2	34.0	19.5	25.2	3.5	10.5
England	ha	354,562	1,848,874	6,290,210	1,839,581	1,100,305	655,856	951,424
	%	2.7	14.2	48.2	14.1	8.4	5.0	7.3

Source Department for Environment, Food and Rural Affairs (DEFRA)
Grade 1: excellent quality agricultural land; Grade 2: very good quality agricultural land; Grade 3: good to moderate quality agricultural land; Grade 4: poor quality agricultural land; Grade 5: very poor quality agricultural land; for more information on grades and subgrades. Please note see the paragraphs accompanying Figure 1 for explanations of some of the limitations of these results including the absence of any land classified as urban in Rossendale district.

Page updated June 2016