

Greater Lincolnshire LEP Food Board - 20th January 2022

Agenda

The meeting will be held from 4.00-6.00pm online, to join the meeting, please use the link sent in the Teams invitation:

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Attendees:

- Sarah Louise Fairburn, Chair
- Amy Conyard
- Rhonda Thompson
- Richard Priestley
- Matthew Naylor
- James Truscott
- William Naylor
- Gemma Clarke
- William Burgess
- James Arnold
- James Dallas
- Robert Smith
- Hugo Marfleet
- Sharon Young
- Simon Pearson
- Mark Finn
- Neal Collishaw

- Ruth Carver, GLLEP Chief Executive
- Kate Storey, GLLEP
- Amy O'Sullivan, GLLEP
- Caroline Illingworth, GLLEP
- Martin Collison, agrifood advisor to GLLEP

Tentative:

- Simon Dwyer

Apologies:

- Duncan Worth

To be confirmed

- Alan Metcalfe
- George Read
- Jonathan Oldfield
- Mark Aitchison
- Mark Suthern
- Mos Kalbassi
- Nick Hay
- Oliver Shooter

4.00pm	Welcome and introduction <ul style="list-style-type: none"> • Apologies • New Members: Mark Finn Lincolnshire CoOp; Amy Conyard Next Frontier Brands (and Bottomley Distillers); Gemma Clarke of Cope Seeds and TerraFarmer • LEP Update 	Sarah Louise Fairburn
4.10pm	Round table discussion on next steps on labour supply - since the October meetings: <ul style="list-style-type: none"> • EFRA Select Committee continued work on labour & report due spring 2022 - GLLEP submission in annex 3 • DEFRA 24th December announcement of a 3 year Seasonal Worker Visa Route: 30,000 (+10,000 potentially) for horticulture, but tapering from 2023 and clear direction to industry to reduce reliance on migration and embrace a UK workforce (see annex 2) • Government wants industry to produce a plan to meet these aims Key questions: <ul style="list-style-type: none"> • Given the gauntlet thrown down by government to reduce reliance on migration over 3 years, what needs to happen or change to meet the challenge government has set? • What changes could deliver more UK worker recruitment and/or support the introduction of more automation to reduce reliance on staff recruitment 	Food Board Members
5.00pm	LEP Updates: <ul style="list-style-type: none"> • Headlines on actions taken by the LEP and UK Food Valley team and Q&A 	Martin Collison
5.10pm	Round table discussion on priorities for 2022: <ul style="list-style-type: none"> • What impact is Covid/EU exit having on the industry currently, & are government actions helping (e.g. priority Covid testing) • What areas (in addition to labour supply) does the food industry need help with in 2022? • What one change could government make which would benefit the development of the industry? 	Food Board Members
5.55pm	AOB and Future Meeting Dates: <ul style="list-style-type: none"> • 12th May 2022 4-6pm • What do members want future meetings to focus on? • Future meeting format (quarterly, virtual and/or face to face when circumstances allow) 	Sarah Louise Fairburn

Annex 1 - LEP Updates

Since the October 2021 meeting, LEP supported activity in the food sector has included:

1. Bids:

- A Community Renewal Fund grant has been received for £430,000 to launch a 6 month UK Food Valley pilot for the seafood sector in North East Lincolnshire. This programme is delivered jointly by the Grimsby and Humber Seafood Alliance and NCFM and was officially launched on 13th January.
- Unfortunately a similar, larger bid, covering the rest of Lincolnshire was unsuccessful. Further bids will be developed to the UK Shared Prosperity Fund (UKSPF), building on the seafood pilot, as the UKSPF is launched in 2022.
- A Levelling Up Fund (LUF) bid for £19m was secured for the A16 corridor (Boston to Spalding) to improve the road for the food sector, workforce and community in the area, led by Lincolnshire County Council.

2. South Lincolnshire FEZ:

- Phase 1 is now largely committed and part of phase 2 is also subject to offers, with a strong level of interest continuing.
- The Centre of Excellence on the FEZ is open and hosting applied innovation work with employers, with students, schools and businesses all using the site.
- Construction of the FEZ Hub Building (due for completion early 2022) is progressing well. It will provide space for 30 SMEs in the food chain to be co-located and to work with the University and other businesses on the site.
- The Lincoln Institute of Technology building on the FEZ, focused on digital technology and engineering was completed in late autumn 2021 and has now been handed over to the University, with an opening event planned for March 2022.

3. Land for food chain development:

- Given the continued strong level of interest in investing in the Lincolnshire food chain, work is being undertaken to ensure that we have the land available for development, both for existing businesses and those who wish to move to or expand in Greater Lincolnshire.
- The Central Lincolnshire FEZ has received strong interest and it is likely to be fully committed by spring 2022.
- A study has been undertaken with Lincolnshire County Council to identify larger sites to accommodate investors in the agriculture and food chain.
- Further work is ongoing with landowners to identify additional sites which could be suitable for food chain development (from glasshouses to fish farms, food processing and cold chain and logistics). Any Food Board members with sites they would like to be considered for this process should please contact Martin Collison.

- The LEP is also developing input to explain the development land requirements to inform local plans and planning authorities. The aim is to explain the types of development being seen to Councils and planners, how this differs to the past and the trends in investment which we are seeing (the first of these, which deals with greenhouses and controlled environment agriculture is currently being piloted with some Councils).
4. Energy Sector:
- A UK Food Valley presentation was made to the LEP Energy Council in December 2021 to set out some initial thoughts on the scale of the energy demand in the food sector and the need to decarbonise etc.
 - The energy sector is keen to focus on working with the food sector to look at ways to fully understand the sector's energy demand and then to work together to decarbonise production, logistics and cold storage. This work will be developed further in 2022.
5. UK Food Valley:
- The UK Food Valley was officially launched at the LEP Conference on 2nd November. Three additional sector investment propositions were launched at this event for:
 - Intensive crops and CEA sector:
https://www.greaterlincolnshirelep.co.uk/assets/documents/UKFV_Investment_Brochures_-_FRESH_PRODUCES.pdf
 - Seafood sector including fish farming: [UKFV_Investment_Brochures_-_SEAFOOD.pdf \(greaterlincolnshirelep.co.uk\)](https://www.greaterlincolnshirelep.co.uk/assets/documents/UKFV_Investment_Brochures_-_SEAFOOD.pdf)
 - Cool chain and logistics:
https://www.greaterlincolnshirelep.co.uk/assets/documents/UKFV_Investment_Brochures_-_Cold_Chain.pdf
 - The seventh UK Food Valley newsletter is due in January 2022 and is now reaching a wide audience. We are keen to feature any industry good news or development stories, please send anything you would like to see featured to Martin Collison.
6. Brexit Transition and Covid-19:
- The LEP continues to collect information on Brexit Transition and Covid-19 impacts on the food chain and feeds this into government.
 - Please continue to feed issues in as they arise.
7. Links to other LEPs:
- A meeting was held to brief the Midlands Engine Operational Board on the infrastructure, innovation and skills needs of the Midlands region food chain on 12th January 2022

- Work is continuing with New Anglia (Norfolk and Suffolk) LEP and Cambridgeshire Combined Authority to promote the agrifood sector along the East of England coast from Felixstowe to the Humber. A launch event on 8th November on this commitment to work together attracted 80 delegates (online).
8. Inward investment:
- The LEP and County Council have met with multiple inward investors in fresh produce, innovative foods, aquaculture and technology to help them develop plans for expansion into Lincolnshire.
9. High Potential Opportunity (HPO) for food processing and automation:
- The HPO was launched on 27th May 2021 with further events with overseas investors and DIT staff in autumn 2021.
 - This has led to additional inquiries from SE Asia, Europe and North America and it is hoped new investment deals will be announced in the next few months.
10. Automation policy:
- Professor Simon Pearson has concluded the consultation phase of the review, he co-chaired with Rt. Hon. George Eustice, DEFRA Secretary of State, on the potential for automation in the horticulture sector. The report will be launched shortly.
 - It is anticipated that government will announce support for automation in 2022, aligned to the need to reduce reliance on migration.
11. Liaison meetings with delivery partners:
- DEFRA Food SME support team
 - IGD national skills and innovation team
 - County Council planning team
 - District councils to ensure that revised development plans take full account of the needs of the food chain
 - Seafood Cluster (fortnightly)
 - DIT Agritech Team (quarterly)
 - Food and Drink Sector Council Export Working Group (6 weekly)

If any business, or supply chain partners you work with, need support the LEP is keen to help.

Annex 2 DEFRA Announcement on Seasonal Workers - 24th December 2021

Industry given certainty around seasonal workers but told to focus on domestic workforce

Seasonal Worker visa route extended until end of 2024, to allow foreign workers to come to the UK for up to six months to pick both edible and ornamental crops.

From: [Home Office](#), [Department for Environment, Food & Rural Affairs](#), [Kevin Foster MP](#), and [The Rt Hon George Eustice MP](#)

Published 24 December 2021

The visa scheme to allow seasonal workers to come to the UK will continue, but the government has demanded a plan from the sector to cut the reliance on foreign labour.

The Home Office and DEFRA announced today (24 December) the Seasonal Worker visa route will be extended until the end of 2024, which allows foreign workers to come to the UK for up to six months to work in the horticulture sector.

There will be 30,000 visas available next year, but this will be kept under review with the potential to increase by 10,000 if necessary. The number of visas will begin to taper down from 2023 and the sector will have to improve pay and conditions. Following the 2019 review of the pilot, the Home Office has reviewed the requirements placed on the scheme operators and updated the seasonal worker sponsor guidance to tighten the compliance requirements.

While acknowledging the sector's reliance on foreign workers, the UK is committed to becoming a high-skilled, high-wage economy and the government has been clear that more must be done to attract UK workers through offering training, career options, wage increases and to invest in increased automation technology.

DEFRA will be bringing forward further proposals in due course on ways to support the sector as well as progressing recommendations in the Automation Review.

Minister for Safe and Legal Migration Kevin Foster said: 'The extension to the Seasonal Worker visa route strikes the right balance of supporting the industry while it transitions to employing and prioritising domestic workers'.

Environment Secretary George Eustice said: 'We had a seasonal worker scheme for agriculture from the time of the second world war and long before we joined the EU. We recognise that agriculture has unique and seasonal requirements for labour at harvest and have listened to our world leading fresh produce industry to understand their needs'.

Changes to the route, which has run since 2019, will force companies to pay those using the route a minimum salary to discourage poor conditions. It will also be extended to ornamental horticulture to support our distinguished flower growers in the UK.

The changes follow a review of the seasonal workers pilot which found the reliance on foreign labour held down wages, disincentivised investment and discouraged workers (both resident and non-resident) into these roles.

Annex 3 - Greater Lincolnshire Food Board Evidence October 2021 - Inquiry into Labour shortages in the food and farming sector

A description of Greater Lincolnshire's agri-food sector has been provided to the committee before so we have only included a short summary here.

Agri-food is Greater Lincolnshire's largest industry supports 75,000 employees in agriculture, food processing, marketing and logistics¹, with GVA of over £3.7billion, 18% of local GVA (3% nationally) and employs 13% of workers (3.6% nationally). This makes Greater Lincolnshire the LEP with the greatest dependence on food production, processing and distribution. Nearly 30% of Innovate UK grants in Greater Lincolnshire from 2014-18 focused on food and agri-tech.

The industry contains 6,000 companies² from SMEs in agriculture and some micro food producers to over 70 large food companies, including multi-nationals. Our agriculture produces over £2billion of crops and livestock, 11% of the English total, with particular strengths in fresh vegetables: 30% of English production, 20% of sugar beet, 19% of poultry and 19% of ornamentals³.

Lincolnshire processes over 50% of UK seafood in 65 fish processors supporting 6,000 jobs, which increases to 10,000 with those in the supply chain. The LEP has 12% of national meat and poultry processing and 16% of vegetable, fruit and potato processing.

The area is the UK's food logistics centre with 30% of national food shipments passing through South Lincolnshire (1,200 finished lorry loads of food per day). The south bank of the Humber has a major food logistics sector and the A1 corridor has major food distribution centres.

Greater Lincolnshire launched the UK Food Valley programme to promote the importance and potential of its food chain and to co-ordinate investment support. Since 2016, the UK Food Valley area has seen over £2billion invested in the food chain, with an additional 7,000 jobs created.

Greater Lincolnshire submitted earlier evidence on the issue of labour supply to the EFRA labour inquiries held in 2020. The recommendations we made in these⁴ still stand, but the challenges of labour supply has increased in the last year, creating an even greater pressure on the industry.

Since our original submission to EFRA inquiries in 2020, Greater Lincolnshire has gathered further evidence from food chain companies on the challenges of labour supply and worked with industry to develop solutions. Our Food Board members and other food companies which have a UK workforce of over 30,000 (7% of UK food processing), have contributed to the analysis we set out below.

¹ ONS, Business Register and Employment Survey (2020)

² GLLEP (2018), Annual State of the Economy Report 2018

³ DEFRA (2018), Structure of the agricultural industry in England and the UK at June

⁴ LFS0052 - Labour in the food supply chain [Labour in the food supply chain - Written evidence - Committees - UK Parliament](#)

Our real concerns can be summarised as:

- The industry has a real opportunity to grow as a result of structural changes from leaving the EU, Covid and wider trends e.g. Net Zero, but labour supply problems are constraining this growth;
- The industry agrees that automation is the long term answer, but analysis suggests this requires investment of over £10billion to reduce labour demand by 10% (current shortfall typically 10-20%). This represents 4 years of profit, at the same time as the industry invests in low carbon, supply chain reconfiguration and healthier products as well as ongoing capital replacements;
- The supply chain for automation technology is constrained, with lead times for automation now typically 9-12 months and a UK wide shortage of engineers to install equipment;
- Wage rises of 10-20% in the last year are the norm (with similar increases in other costs), but this is not addressing the problem and simply leading to staff moving between companies, with no net increase in supply. It is, however, leading to substantial cost inflation, meaning we expect double digit inflation in food prices over 2021-'22, hitting hard pressed families;
- Unless a secure labour supply is in place the industry is not able to make the margins needed to support investment in technology;
- A 5-10 year programme of investment is needed in skills, innovation, capital equipment and buildings, supported by government and industry, to enable the sector to transition to a high wage, higher skilled economic model.

Current EFRA Inquiry into Labour Shortages in the Food and Farming Sector

1. What is the extent and nature of labour shortages currently being experienced in the food supply chain?

The current labour shortages in the industry are impacting every business and leading to changes in business policy as they anticipate the problems will not be solved quickly.

Whilst some businesses are seeking to invest, labour supply or automation potential to reduce the need for labour, is now a key determinant of whether the investment case is deemed viable.

Other businesses, particularly those with high seasonal demands for labour, are already reducing production, e.g. some vegetable producers, with any reduction in production being replaced with imports which have a higher environmental impact and cost, leading to food price inflation.

Companies are consistently reporting a consumer and supply chain desire to purchase more UK production, but unless they can secure the resources needed to expand, including labour, they are reluctant to make these investments.

These challenges are industry wide and there are shortages of workers on farm, in packhouses, abattoirs, food processing and logistics. Businesses which operate nationally report that this challenge is UK wide, meaning there is limited scope to address the problem by relocating staff. Our food businesses now typically have unfilled vacancies of 10-20% of their planned workforce.

From 2016-'20, the National Living Wage increased labour costs for those on the minimum wage by about 40% once overheads are taken into account. Recent industry evidence suggests that for some operational roles wages have increased by a further 15-20% in the last year alone, but this is not solving the labour supply challenge.

2. What are the factors driving labour shortages in the food supply chain?

The challenges in securing staff are not unique to farmers and food processors, with all sectors reporting shortages of workers. The result is growing competition for labour across the economy e.g. major online retailers are offering £3,000 signing on bonuses for warehouse workers and poaching food chain staff. Unless changes are made which encourage a higher proportion of the indigenous working age population to take up employment, this situation is unlikely to be resolved assuming that migration policy remains unchanged.

The industry recognises the need to improve wages and conditions and across the industry we are seeing the fastest rise in wages for decades. However, to date this has had very little impact on recruitment because of low unemployment and wage rises are simply leading to staff moving between companies, but not attracting additional workers to the sector.

Furthermore, supply chain pressures to keep making food cheaper, means industry has been forced down a cost cutting route. The expectation is that this model has now reached the point at which the cost of food has to rise substantially for the industry to be sustainable. With labour and other costs rising by 10% or more in a sector with low margins, the industry expects to see consumer food prices rising by more than 10% in the next 2 years with major consequences for hard pressed families.

These longer term trends have been exacerbated by Covid, which led to labour being displaced and some workers choosing not to return to the workforce (both migrants and UK based workers). Leaving the EU increased the problem by making the UK less accessible to overseas workers and leading to many EU workers in the food industry, returning home.

During much of 2020 and early 2021 the workforce crisis was masked by the short term impacts of Covid and the response of government, industry and workers. The food industry, which is rightly proud of its record of keeping shelves stocked during the pandemic, used overtime, furloughed workers and students (courses disrupted) to meet increased demand in food retail.

For example, lorry drivers who had delivered cars before Covid were retrained to transport food. As pandemic lockdowns eased and the economy recovered, these

additional food chain workers returned to their previous employers or studies, but the increase in demand for UK food witnessed during Covid has been sustained, leading to growing workforce shortages.

The food industry recognises it has a problem with perception, but would argue this applies equally to other manufacturing sectors and is also in many cases outdated by changes in the workplace and radically improved pay and conditions. There is a need for the education and careers services to work with food chain employers to promote manufacturing job roles.

3. What is the outlook for the labour shortage situation in the coming months and years?

The industry expectation is that the situation is likely to deteriorate in the run up to Christmas 2021, when the industry would expect to recruit additional seasonal staff. With UK vacancies over 1 million⁵ for the first time, businesses' expectations are that finding this seasonal supply of labour will be impossible. The expected shortages includes production workers as well as jobs in distribution.

Beyond 2021, labour constraints are expected to continue as every sector is seeing shortages and there is no easy or obvious solution to increase workforce supply. The food chain thus recognises that the real medium to long term imperative is to adopt automation to enable greater labour productivity. In the food chain, the changed supply chain dynamic, as well as longer term trends for more consumers to favour UK sourced products, means there is real potential to grow the UK food industry substantially, but this requires either more workers and/or a step change in automation.

4. What other issues are affecting the food supply chain?

The food industry is at the same time dealing with structural changes in the industry due to Covid and longer term trends, e.g. the rapid increase in online sales, or the demand for low carbon products. These changes are necessitating large levels of investment, on top of the need to automate. The resultant capital investment programmes are expensive in terms of management time and financially.

Cost pressures in the food industry are being seen as a result of leaving the EU, with the delivered cost of imports typically rising 5-10%. Other cost rises in packaging, fuel, energy, transport etc are also adding pressure. At the same time, the supply chain is trying to keep consumer prices down, squeezing supply chain margins. Lower margins are making it harder for companies to make the capital investments needed to automate.

The supply chain for automation technology to reduce labour demand is under real pressure, with multiple companies reporting that in 2019 they would have waited 2-3 months for new equipment, but now this is typically 9-12 months and up to 18 months. This is making it harder to automate as the supply of equipment and the engineers is

⁵ [Vacancies and jobs in the UK - Office for National Statistics \(ons.gov.uk\)](https://www.ons.gov.uk/economy/employmentandlabourmarket/other/vacanciesandjobs)

so constrained. Anecdotal evidence from businesses suggests this is an international problem.

The concerns about future shortages of inputs, including labour supply and problems securing logistics, is putting some businesses off investing in future production.

5. What impact will the timetable for introducing physical checks at the border on food and live animal imports from the EU have on the current issues being experienced by the UK food supply chain?

The delay to the imposition of new rules on imports is welcomed by businesses which import food, notably the UK's largest fish processing cluster in Grimsby who import 90% of their fish. The new rules are not yet ready and the industry is concerned government is not moving fast enough to develop digital solutions to address the majority of the problems with paper EHCs.

A consortium of Greater Lincolnshire businesses and the University of Lincoln are working with HMRC, British Standards Institute (BSI) and FSA on the £2.9m Trusted Bytes⁶ programme (Innovate UK), to digitise the paperwork and traceability needed in the food chain for trade. This initiative is exactly the type of response needed to enable new systems to be embedded without unsustainable costs for the supply chain.

The food industry is, however, concerned that additional checks and cost were applied to food exports to the EU from January 2021. This has put the UK food chain at a competitive disadvantage as seen in the dramatic fall in UK exports to the EU in the first half of 2021.

This does not seem equitable and, whilst most of Greater Lincolnshire's food businesses are net food importers (as is the UK), for those businesses focused on exports these changes have been very damaging. Many of our exporters are now facing major cost increases, lost markets or have chosen to relocate part of their business, leading to falls in UK economic activity. The food industry recognises leaving the EU was always going to lead to additional paperwork and costs, but to support UK industry it is vital that the same costs applied to exports also apply to imports.

6. What measures has the Government taken to alleviate the problems being faced by the food supply chain this year? To what extent have they been successful?

The recent announcements on increasing the visas for HGV drivers (5,000), poultry workers (5,500) and butchers (800) are welcomed, but seen as too little, too late by the industry. The problems with labour supply are industry wide and much larger than these schemes allow. The time limitation imposed also means the industry will again face a crisis in a few months time without enough time to replace this labour demand with automation or recruit new UK staff.

⁶ [Multi-million Pound 'Trusted Bytes' Project to Boost Productivity of the Global Fresh Produce Trade \(lincoln.ac.uk\)](https://lincoln.ac.uk)

Greater Lincolnshire has actively engaged in the review of horticultural labour supply and automation, with Professor Simon Pearson (University of Lincoln) co-chairing this review with the DEFRA Secretary of State.

This horticulture and fresh produce sector is critical to our food chain and whilst the industry welcomed the extension to SAWS for 2021, there are three major challenges with this scheme:

- The numbers allowed does not meet industry needs and the late appointment of some providers in 2021 means many businesses have lost crops due to a lack of harvest workers;
- The lack of clarity on future years, including 2022, means some producers are now taking decisions to reduce production in 2022 as they need to place orders for plants and inputs now to grow crops next year, but are not prepared to take the risk if they do not know if there will be harvest labour available;
- The exclusion of the ornamental horticulture sector from the programme means this sector, nearly 90% supplied by imports despite strong growth in recent years, is at risk of contracting in the UK even whilst UK demand grows. Similar problems exist in food processing companies not covered by SAWS, but who like production horticulture have similar seasonal labour demands.

7. Does the Government need to take further steps to support the food supply chain?

Greater Lincolnshire is keen to see the government take further steps to support the food chain, focusing on enabling the industry to automate to reduce the reliance on labour supply. A 5 year transition period is needed to deliver the magnitude of change needed.

Greater Lincolnshire started on the automation journey in 2015, establishing the Lincoln Institute of AgriFood Technology (LIAT), now Europe's largest agrifood robotics team, as well as expanding the work on automation at the National Centre for Food Manufacturing (NCFM). The area also benefited from the development of Bishop Burton Showground campus and the launch of the Lincolnshire Institute of Technology with a focus on educating the food chain workforce.

Despite over £100m of investment in Greater Lincolnshire agrifood skills and innovation infrastructure and projects over the last 5 years, these centres need to expand further to meet the demand in the UK's largest manufacturing sector for workforce supply and automation.

We are beginning to see increased investment in production systems which are less seasonal, e.g. protected cropping, and are actively trying to support this as it leads to permanent, well paid, full time jobs making it easier for the industry to recruit. We would welcome government support for this transition in production systems which also helps justify investment in automation.

With farming, food processing, food transport and logistics employing over 1.1million UK workers, the magnitude of the automaton challenge is such that over £10billion of

investment is needed⁷ by food chain companies to reduce labour demand by 10%. The UK food processing sector has an output of £85billion with profit margins of under 3%, this means the investment required is circa 4 years worth of profits, but companies also need to simultaneously invest in low carbon technology, new products and ongoing reinvestment in plant and machinery.

There is a clear public sector role to support this transition with incentives (e.g. tax breaks, grants) and to support investment in skills and innovation to enable the transition.

There is a need to support the development of an enlarged UK food engineering and technology base including technology developers, automation providers, systems integrators and maintenance engineers. The demand for automation is global and with the UK representing under 1% of global agriculture and 3% of the total value of global food consumption, the potential for exports of UK technology addressing the labour supply challenge is large and growing. Supporting the growth of a UK technology cluster would help address the capacity constraints in the UK food chain at the same time as developing a domestic high technology engineering cluster helping meet the global demand for food chain automation, leading to high value exports.

⁷ Typically each job replaced by automation costs £100k or more to purchase and install the equipment, so even to moderate the industry's labour demand by 10% (or 110,000 workers) would cost circa £11billion