The Scale and Impact of the Farming, Food, Drink & Rural Economy in Gloucestershire

March 2019

Contents

Acknowledgements

This report was commissioned by the Gloucestershire LEP Agri, Food and Rural Business Group to establish the value of farming, the food and drink sectors and the wider rural economy to the county. In compiling the report, which has drawn on a wide range of published sources, a consultation event was held at the Royal Agricultural University (RAU) on 29th November 2018.

The lead author of this report, Martin Collison, has for over 30 years combined working in agricultural and horticultural supply chains with economic development consultancy for the rural economy and food chain and roles in agrifood and rural education. He is committed to the need to drive growth in our rural areas and, in particular, to champion the role which innovation and knowledge can play in facilitating a World class future for our agri-food and rural industries.

Introduction

This report was commissioned by the Gloucestershire LEP Agri, Food and Rural Business Group to establish the value of farming, the food and drink sectors and estimates of the significance of the wider rural economy to the county.

The agricultural and rural sectors will undergo a period of substantial change in the next 5-10 years, with the magnitude and speed of change likely to be more profound and faster than any change for at least two generations. The drivers of this changing environment are complex and include:

- Political and policy changes - with Brexit meaning that we will develop a new UK agricultural policy after over 40 years of the CAP which has influenced how we farm, manage the rural environment and develop the rural economy. Changes to labour supply and trade will also affect how our rural economy functions;
- Distribution changes - the way products and services are sold to consumers is changing and requires our agrifood and rural industries to embrace change as new distribution models, most supported by digitalisation, emerge;
- Technological change - the economy is being revolutionised by digitalisation and automation, which is impacting right across the agrifood and rural economy;
- Societal change - the demographics of rural areas are changing and 'jobs for life' have gone with most people expected to have multiple careers or job roles creating a need for constant economic renewal, innovation and upskilling.

This report has helped us to understand the scale of our agrifood and rural industries at this critical time. The report is, however, not an end in itself, but the first step on a longer journey. Our aim must be to ensure that our rural areas and the agri-food sector can respond to the changes they are facing and play a growing role in the Gloucestershire economy.

We are keen to continue to work with you to set out a clear vision for our rural areas and the agrifood economy. We have already established a group, chaired by Tamsyn Harrod, working to develop a Food Strategy for Gloucestershire. Our intention is to also establish two other stakeholder groups; one that includes large and medium sized agrifood businesses, and one that includes SMEs (farmers, retailers, restaurants, etc.).

It would very helpful if could feed back to us on the evidence we have collected so far or by engaging with us to set out an ambitious and dynamic strategy for our rural areas. The team and I look forward to working with you on this project.

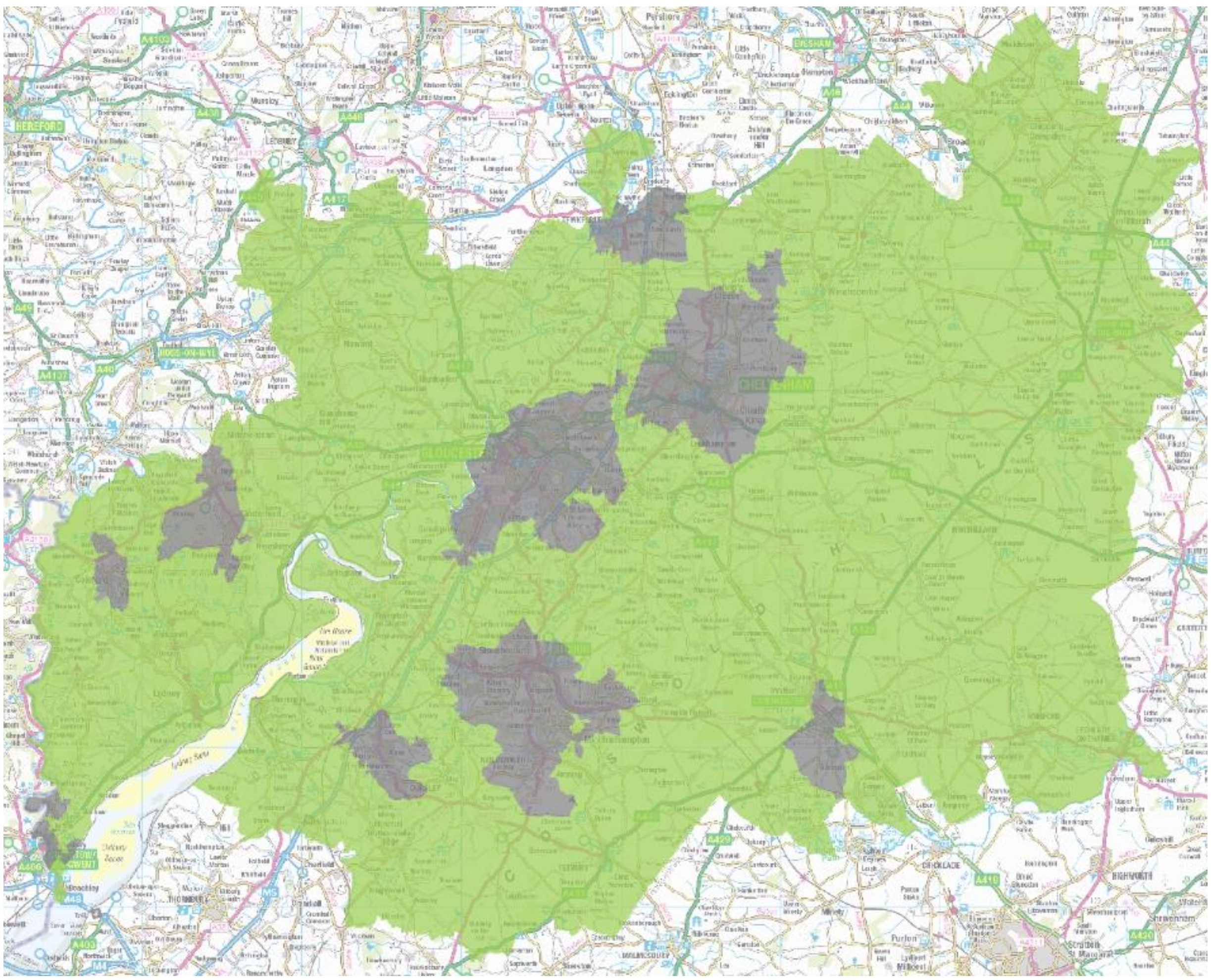
Professor Jo Price
Vice-Chancellor Royal Agricultural University
Chair of the Gloucestershire LEP Agri, Food and Rural Business Group

Executive Summary

The majority of the land area of Gloucestershire is rural (figure 1). Of the 6 districts in the county: Cotswold is one of only 27 districts nationally which is 100% rural in character (for its population); the Forest of Dean is 95% rural; Tewkesbury is 53% rural; Stroud is 42% rural, with both Cheltenham and Gloucester effectively 100% urban.

Overall, rural Gloucestershire is home to just over 42% of the population and supports an estimated 30% of all jobs in the county.

Figure 1 DEFRA's official classification of rural and urban areas[1] in Gloucestershire



Rural Gloucestershire is an attractive and dynamic place which is instrumental in the county's success, not only through the homes and employment it provides, but critically through making the County somewhere that people and business wish to be due to the quality of life on offer.

[1] DEFRA (2016), Official Statistics, Local Enterprise Partnership simple rural-urban maps: Census 2011 - Gloucestershire LEP OAs by rural / urban classification 2011

The Gloucestershire Agrifood supply chain employs over 50,000 people, 14.9% of the workforce and generated a GVA of £1.39billion in 2017, or 8.8% of the local economy, both higher shares of the economy than seen nationally.

There is a distinction between traditional and quintessentially rural sectors such as agriculture and forestry and the *rural economy*. The rural economy is much broader and increasingly contains high growth, knowledge intensive companies in villages and market towns.

The Gloucestershire rural economy is very diverse, with strengths in areas including manufacturing, wholesale, retail, accommodation, professional and scientific, education, arts and entertainment, all sectors normally expected to be seen concentrated in urban areas.

Concentration of manufacturing and education in the Forest of Dean, ICT in the Cotswolds and the nationally significant strength in agrifood and rural economy academic and research centres across the county, are clear indications of the breadth and dynamism of the local rural economy.

The tourism and visitor economy is concentrated in rural areas of Gloucestershire. In particular it is vital to the Cotswold economy where tourists spent over £326m in 2017 and where it employs over 14% of the workforce. Tourism also has a direct link to agrifood, with 32% of tourists spending in Gloucestershire being devoted to food and drink, some £340m annually.

Whilst many of the companies in the rural economy are SMEs, the rural economy includes large national and internationally significant companies including the largest agronomy business in the UK, Agrii, Lucozade, Ribena and a raft of medium to large scale food producers with excellent growth potential such as Severn and Wye Smokery.

The rural economy has substantial potential for growth through:

- Embracing the global demand for new technology in the food chain, for example, the need for cyber security as digitalisation pervades every aspect of the food chain;
- Growing high value tourism by promoting Gloucestershire's year round attractiveness through its landscape, food offer and heritage as short breaks and longer stays grow;
- Adding value to food and drink through investing in added value processing;
- Building on the potential to grow manufacturing as Industry 4.0 leads to reshoring.

In releasing this potential it is important to bring together the business community with the innovation and investment communities. The presence of national leaders in agrifood and rural research, coupled to local specialisms such as cyber security, offer the potential to make a real impact on growth. The UK agrifood sector is less than 2.5% of the global food chain and under 1% of global agriculture, which means that any new technologies developed in Gloucestershire for the agrifood supply chain have major export potential.

Gloucestershire's Agriculture and Food Sector

UK & Global Context

The UK food chain is a large and dynamic sector which has continued to grow throughout the last decade. Even during the economic downturn in 2008-'10, when the economy as a whole shrunk by the largest percentage since the 1930s, the food chain continued to grow with its slowdown lasting less than 6 months.

With sales of over £220billion in 2017, the industry generates a GVA of over £110billion and employs 3.9million people[2] in the UK. It starts with input supplies (e.g. seeds, ICT systems, packaging, transport etc.) which are used in agriculture, food processing, marketing, distribution, food retail and catering to produce and deliver food to consumers. The industry is the largest land user in the UK with 17.2 million hectares farmed[3].

The 'end to end' food chain, from farm to fork is[4]:

- The UKs largest manufacturing sector, larger than automotive and aerospace combined;
- Accounts for £220billion of consumer spending, with this split between food retail at £124billion and food service (catering and hospitality) at £96billion;
- Generates £111billion of Gross Value Added (GVA) with food and drink manufacturing representing 26%, food retail 27% and catering 29%, with smaller contributions from marketing and logistics at 11% and agriculture at 7%;
- Employs 3.9million people, with 2.9million working in the consumer facing parts of the chain (retail and catering) and just over 1million in agriculture, food processing and distribution;
- A major trade sector, with £46billion imports of food and drink and over £22billion of exports in 2018, an 8% over 2017 and 45% higher than in 2008;

The food sector is also of growing importance to other sectors with:

- Approximately a 1/3rd and growing of tourism spending as food & drink becomes a central part of the tourism offer, with local and regional products essential for value creation;
- 30% of UK road haulage being the transport associated with the food chain;
- The food chain responsible for 14% of UK energy consumption.

[2] DEFRA (2018), Agriculture in the UK 2017
[3] DEFRA (2018), Farming Statistics Final crop areas and cattle, sheep and pig populations At 1 June 2018 - England
[4] DEFRA (2018), Agriculture in the UK 2017

This UK strength carries through at EU Level, with the food and drink industry the largest employer in European manufacturing with 4.51million staff (15% of manufacturing employment). By value it is the largest EU manufacturing sector, representing 15.2% of manufacturing turnover: €1.115 trillion in 2015. It has 294,000 companies and SMEs represent 48.1% of turnover. Ultimately the industry represented 13.8% of EU household expenditure in 2016[5].

Demand for agrifood products is growing in the UK and globally:

- Global demand for food is increasing with predictions this will continue until at least 2050. The reasons for increased demand are set out in the Foresight Report[6] which predicted global food demand would rise 50% by 2030 and 60-100% by 2050 (compared to 2010).
- The global food retail sector was worth $4.3trillion in 2015 and growing at 6% per annum[7]. Whilst data for the food service sector is less accessible, the best estimates available for the food service sector suggests that the total food market was worth over $8trillion, nearly five times the value of the global automotive market (circa $1.8trillion) in 2017[8].
- Global agriculture was valued at $3.72trillion in 2016[9], of which $2.45trillion was crop output and $1.27trillion livestock products.

The global food chain is embracing technology to improve efficiency and to address long term challenges, including:

- The food chain still employs 40% of the global workforce, but this is falling rapidly in less developed areas of the World as people move to cities. This is in turn leading to a wave of investment in technology so that productivity per worker can be increased;
- The industry is responsible for 30% of global greenhouse gases: nearly half of which is from land use change because yield growth has not kept up with increased demand. This is leading to demand for technology to address this, an area in which the UK is a global leader;
- Over 30%+ of all food is wasted globally, in both developed countries and the developing World, and as with GHGs, technology is being deployed to counter this.

This scale and demand for technology, both in the UK and globally, means that the UK has substantial potential to export not only more food and drink, but also the technology and knowledge to facilitate a more productive and sustainable industry.

[5] Food and Drink Europe (2018), Data and Trends EU Food and Drink Industry 2018
[6] Beddington, Professor Sir John, Government Office for Science (2011), Future of Food and Farming: final project report
[7] US Department of Agriculture (USDA) Economic Research Service (2013), Global Food Industry
[8] Statista (2019), Revenue of the leading automotive manufacturers worldwide in 2017
[9] FAO (2019), Macro Statistics, value of agricultural production

The Scale of Gloucestershire Agriculture and pre Consumer Food Chain

Gloucestershire agriculture[10] directly supports 6,280 jobs (2.1% of the English total) & covers 193,000hectares (2.1% of England's total farmed area).

However, at UK level there are (DEFRA 2018)[11] 1.5 employees in food processing and distribution for every one person employed in agriculture and a further 6.8 jobs in food retailing and catering for every job on farm. The GVA position is similar, with the food chain generating over 10 times the GVA of agriculture because most of the value created is in the post farmgate supply chain (and a small amount in the inputs supplied to farmers).

The section below uses data from DEFRA, ONS and other government publications, to estimate the number of jobs and GVA in Gloucestershire's agriculture, food processing and distribution parts of the food chain. A later section then adds analysis of food retailing and catering to give a complete, end to end, estimate for the whole food chain.

Detailed data for the value of agricultural output is not available at smaller spatial levels and therefore it has been estimated, based on the share of agricultural production and the same share of the (UK and England) value of agricultural inputs (intermediate consumption), £13.65bn in England. This 'intermediate consumption' includes: seeds; energy (electricity and fuels for heating, motor and machinery fuels), fertilisers, plant protection products, veterinary expenses, animal feed (compounds, straights, feed produced & used on farm or purchased from other farms), total maintenance (materials, buildings), agricultural services, financial intermediary services indirectly measured (FISIM) and, other goods and services supplied to farms.

Subtracting intermediate consumption from the gross output (at market prices) gives the Gross Value Added (GVA), which is available to support labour costs and to give a return to the farm owners and to support tax and investment.

Table 1 shows that Gloucestershire's agriculture:

- Generates output of £333million per annum (2017 estimate), with crops representing £116million and livestock £181million, plus a small amount of other agricultural activity;
- The majority of crop output is from four enterprises: wheat, barley, oilseed rape and fruit. Fruit, despite a very small crop area, is very high value per hectare;
- The majority of livestock output is from three enterprises: beef; poultry meat and milk;
- **This output translates into a GVA of £102million after direct production costs.**

[10] DEFRA (2017), England 2016 County/Unitary Authority datasets
[11] DEFRA (2018), Agriculture in the UK

Table 1 - Gloucestershire Farm Output 2017

Enterprises		% England	£million
Output of cereals of which:	wheat	1.8%	33.1
	barley	2.5%	16.1
	oats	2.4%	1.8
Output of industrial crops of which:	oilseed rape	2.2%	15.5
	protein crops	1.9%	2.9
	sugar beet	0.1%	0.2
	other industrial crops	1.0%	0.2
Output of forage plants		2.9%	7.5
Output horticultural products of which:	fresh vegetables	0.4%	4.2
	plants and flowers	1.0%	12.2
Output of potatoes (including seeds)		0.5%	3.4
Output of fruit		2.0%	14.0
Output of other crop products incl. seeds		1.0%	5.2
		Total crop output	**116.2**
Output of livestock primarily for meat of which:	cattle	2.2%	35.8
	pigs	0.7%	7.5
	sheep	2.0%	10.8
	poultry	2.0%	43.0
Gross fixed capital formation (investment in breeding stock) of which:	cattle	2.2%	8.9
	pigs	0.7%	0.0
	sheep	2.0%	2.3
	poultry	2.0%	4.6
Output of livestock products of which:	milk	2.0%	60.7
	eggs	1.5%	6.3
	other livestock products	1.5%	0.9
		Total livestock output	**180.9**
Other agricultural activities		2.0%	16.7
Inseparable non-agricultural activities		2.0%	18.9
		Output (at market prices)	**332.7**
		Total intermediate consumption	**230.9**
		Gross value added at market prices	**101.7**

(Sources: this table is based on DEFRA (2018), Agriculture in the UK 2017 data on the value of each enterprise at UK level and multiplied by the % of each enterprise in England found in each county and unitary from DEFRA (2017), England 2016 County/Unitary Authority datasets)

Agricultural Supply Industry

DEFRA's Agriculture in the UK 2017 (2018) reports that the agricultural supply industry (see intermediate consumption above), employs 52,000 staff and generates a GVA of £3.4bn (split between agricultural input manufacturing and merchanting). Gloucestershire with 1.4% of UK (1.7% of English) agriculture output by value is therefore estimated to support 730 jobs in the supply industry; generating a GVA of £48m in the supply industry.

Professional and support services

There is not any official and reliable data at local or national level for the numbers of academics, researchers and professionals who are employed to support the farming and food chain (partly because many of those involved only spend a proportion of their time working in this sector).

However, anecdotal and some national evidence shows that specialist accountancy, legal, land agency, trade bodies and technical advisory services[12] provide a large number of professional jobs to support the industry. A conservative estimate has been arrived at as follows for those who provide direct advice to farmers:

Table 2 - Professional Employees supporting Agriculture

Sector	Estimated jobs	Evidence base
Crop and livestock consultants	7,000	AICC, Basis Professional register (circa 5,000), FACTS (circa 2,500)
Large animal veterinary	2,140	10% of vets in farm practice, Lowe (2006)[13]
Agricultural consultants, land agents, solicitors	6,000+	BIAC[14] (circa 250 members), CAAV[15] (circa 2,200 members), ALA[16] (circa 1,000 members)
Total professional staff	**15,140**	

[12] NB, DEFRA data on the industry includes financial services and is thus assumed to cover agricultural banking

[13] Lowe Professor P (2006), Unlocking Potential: A report on veterinary expertise in food animal production

[14] British Institute of Agricultural Consultants, website data

[15] Central Association of Agricultural Valuers, website data

[16] ALA, Agricultural Law Association, website data

In practice the actual number of these support staff is believed to be higher, but this estimated figure of 15,140 has been used and applied to the % of the agricultural industry in Gloucestershire. For purposes of GVA, the assumption is that GVA per capita in these professional roles averages £40,000 per capita, or £606m for the UK.

Gloucestershire with 1.4% of UK (1.7% English) agricultural output value would therefore be estimated to support:

- 212 jobs in the professional services supporting agriculture;
- A GVA of £9m in the professional services sector.

Research and Academic

One area in which Gloucestershire has a much larger share of national agricultural and food sector activity than the size of its agriculture and food sector would suggest, is its concentration of research and academic provision which has a national and international significance.

There is limited evidence nationally on the agricultural and food sector academic and research community. The Gill Review[17] in 2007 estimated that there were 1,160 academics directly employed in agricultural education in the UK Higher Education sector. The sector however, also has Further Education staff, services the wider food chain (beyond this agricultural estimate) and includes substantial numbers of researchers and research students.

Gloucestershire has significant national presence in this market:

- Campden BRI has 400 staff and is a national and international leader in food chain research and advisory services as well as hosting research students. It is based in Chipping Campden and has offices in Leamington Spa, Hungary and Korea. It serves 2,500 member companies who operate 4,500 sites in 80 countries;
- Hartpury College and University has 3,600 students, split 50% between A Levels/diplomas and 50% studying undergraduate and postgraduate degrees, with a significant proportion of its activity focused on the land based sector. This makes it amongst the largest providers in the UK and a recognised global leader in equine sport science and education;
- Royal Agricultural University (RAU) at Cirencester has ~1,100 Higher Education students (undergraduate and postgraduate) and has a long history as a national land based provider;
- The Countryside and Community Research Institute (CCRI), part of the University of Gloucester, is the largest specialist rural research centre in the UK with an international reputation. There are existing collaborations with the Royal Agricultural University and Hartpury College for the purposes of research, education and knowledge exchange. The

[17] Gill Review (2007), Land Based Studies Review for HEFCE

CCRI has 26 staff, and has received funding from horizon 2020, Defra, other national agencies and 3rd party private donors.

This collective strength in education, applied research and knowledge exchange is estimated to include over 1,000 staff, of whom 600 are academics related to the agrifood industry. Applying the same GVA per capita as for professional services, suggests a GVA contribution of £40m.

Agricultural Support

A challenge for UK agriculture at present is that agricultural production receives support from the Common Agricultural Policy (CAP) which, assuming Brexit proceeds, is due to be withdrawn in its current form, beginning in 2021 and concluding by 2027/28 (the 'transition period').

- For Gloucestershire current CAP receipts, under the basic payments scheme and greening, are estimated to be worth £42.6m[18] in 2019.
- In addition, some land managers and farmers receive additional funding as development grants (LEADER and RDPE) or for more targeted environmental work.

Whilst the basic principles of how the new UK Agriculture Policy will function have been set out, in the draft Agriculture Bill and the proceeding Health and Harmony Consultation (DEFRA 2018), there remains considerable uncertainty about how future support will be provided.

The proposed policy framework is primarily focused on providing support for environmental management and the provision of public goods, with more limited support, particularly during the 'transition period', for productivity boosting investment support.

Food Processing and Distribution

Figures for food and drink wholesaling (BRES 2018[19]) and food and drink manufacturing employment in Gloucestershire are used for the middle of the food chain, with the proportion of the UK workforce employed locally in food and drink manufacturing used to estimate GVA.

The UK food chain (post farm gate and pre retail and catering) employs: 390,000 staff in food and drink manufacturing[20]; 230,000 staff in food and drink wholesaling and 6,000 staff in food and drink industry supply[21], a total of 626,000 jobs. DEFRA (2017) records the chain's GVA as: £28.8bn for food and drink manufacturing; £0.4bn for food and drink industry supplies; and,

[18] Based on 193,000hectares of farmland, at £221/hectare, from the John Nix Pocketbook for Farm Management (2019), 49th edition
[19] ONS, Business Register and Employment Survey (2018)
[20] DEFRA (2018), Agriculture in the UK 2017
[21] The figure for food and drink industry supply is believed to be much larger than this DEFRA data suggests given that individual sub-sectors such as packaging employ more people than this UK tota

£12.0bn for food and drink wholesaling, or a total of £41.2bn. This equates to a GVA of £65,815 per job.

Gloucestershire has 6,055 staff employed in food and drink manufacturing (BRES 2018), with data showing that this workforce is employed as follows:

- Food processing employment is 3,235 for food and drink manufacturing;
- Food storage, wholesale and distribution is based on those directly employed in marketing food, beverage and tobacco products and 30%[22] of the workforce in road freight and cargo handling. This gives a food distribution workforce estimate for Gloucestershire of 2,821.

The combined workforce, 6,056, is just under 1.0% (of 626,000) of the UK total, giving a direct food chain estimate of £399m of GVA in the wider food chain.

As with agriculture, the food chain is also a user of specialist professional and advisory services, but data on this is sparse. Based on the agricultural data above, pro rata for the size of the post farmgate food chain (marginally fewer staff, but a GVA nearly 4 times as large as agriculture), this has been estimated as being twice as large as agriculture:

- 425 jobs in the professional services supporting the post farmgate food chain;
- A GVA of £8m in the professional services sector.

Agriculture and the Food Chain (pre retail and catering)

Combining all the data from above allows us to produce an estimate for the scale of the Gloucestershire core food chain from agricultural inputs to factory gate.

Table 3 - Gloucestershire Food Chain (pre retail and catering)

Stage of chain	Employees	GVA £m
Agriculture	6,278	102
Agricultural supply industry	730	48
Professional services to agriculture	212	9
Professional services to the food chain	425	18
Research and academic	1,000	40
Food processing and distribution	6,056	399
Total	14,701	£616m

[22] 30% is the proportion of UK road freight tonne kilometres which relate to supplies onto farms and the post farmgate food chain, based on DfT Freight Statistics (2018)

Analysis

Gloucestershire has:

- 1.4% of England's crop production by value, worth £0.12bn
- 1.9% of England's livestock production by value, worth £0.18bn
- Other agricultural activities worth £0.03bn
- 1.7% of England's total agricultural production, worth £0.33bn

The county produces this output on 193,000hectares of farmland, 2.1% of the England total and employs 6,278 staff, also 2.1% of England's farm workforce[23].

This suggests that in pure agricultural productivity terms the county has a relatively low value agricultural sector, with more focus on extensive enterprises with low output per hectare (e.g. grazing livestock) and a smaller focus on intensive high value crops (with the exception of fruit).

However, the county is, due to its World class and iconic landscape, villages and market towns more focused on rural tourism than more intensively farmed areas. This is explored further below, and adds considerable value to the economy based on agricultural landscape management and the provision of high value, premium food and drink products instrumental in making the area attractive to tourists and as a high quality residential location of choice.

The wider food chain, at only 1% of the national total, is smaller than would be expected by the LEP's share of population or share of agricultural output (1.4%). This suggests that the added value part of the chain, which processes agricultural output into much higher value food and drink products and then markets and distributes these is relatively underdeveloped. This offers potential for substantial economic growth, even if farm output was not to increase locally.

[23] DEFRA (2017), England 2016 County/Unitary Authority datasets

The Consumer End of the Gloucestershire Food Chain

The consumer end of the food chain is split on a national basis broadly 50/50 in employment, sales and GVA (DEFRA 2018)[24] between food retail and food service (catering, hospitality):

- Food service employs more than 50% of the workforce, at 1.75million, and generates just over 50% of 'consumer end' GVA at £32.4billion but just under 50% of the turnover at £96billion. Each job thus on average generates sales of £54,850 and a GVA of £18,500;
- Food retail employs under 50% of the workforce, at 1.11million, and generates just under 50% of 'consumer end' GVA at £29.8billion but over 50% of the turnover at £124billion. Each job thus on average generates sales of £111,700 and a GVA of £26,750.

In Gloucestershire[25] in 2017:

- Food and related retail provided 13,370 jobs in Gloucestershire, employing 4.5% of the local workforce. Based on the average UK GVA per capita in this sector, this suggests a local GVA for food retail of £358m;
- Food service including catering and hospitality employed 22,500 (7.5% of the workforce), based on food service and 50% of the hotel sector workforce[26]. Based on the average UK GVA per capita in this sector, this suggests a local GVA for food service of £416m.

Table 4 - Gloucestershire 'Consumer End' Food Chain

Stage of chain	Employees	GVA £m
Food retail	13,370	358
Food Service	22,250	416
Total	35,620	£774m

The stronger presence of the food service sector locally, larger in GVA terms than food retail, is the reverse of the national picture and is due to the large tourism industry in Gloucestershire.

This is particularly concentrated in the Cotswolds (see further analysis below) where it employs over 14% of the local workforce.

[24] DEFRA (2018), Agriculture in the UK 2017
[25] Business Register and Employment Survey: open access, local authorities: county / unitary (as of April 2015), Gloucestershire, 2017, ONS Crown Copyright Reserved [from Nomis on 25 November 2018]
[26] Based on ONS - 5610 : Restaurants and mobile food service activities; 5621 : Event catering activities; 5629 : Other food service activities; 5630 : Beverage serving activities; and, 50% of the workforce in 5510 : Hotels and similar accommodation

Non Farming Enterprises and diversification

DEFRA no longer produce detailed statistics on farm diversification at regional or county level. The last detailed data was for 2010, which is considered to be too long ago to still be valid to cite in detail.

During the long agricultural recession at the start of the new Millennium, data shows that diversification grew strongly in all regions as farmers sought to develop new sources of income.

As a result there are many reports from 2000-'10 which deal with diversification, but with the renewed interest in agricultural production following the upturn in prices after 2007, DEFRA, along with other commentators, have reduced the frequency and detail with which they collect diversification data. In some ways this is surprising, as national data (see below) shows that rates of diversification have continued to grow since 2010.

However, the broad spatial messages from the historic data are believed to still hold true:

- The South East had the highest rates of diversification in 2007/08[27] at 75% of all farms, compared to 48% in the South West region;
- Diversification is higher in areas close to London and other major cities and falls the further from these large urban centres you travel. The exception is farms in National Parks and Areas of Outstanding Natural Beauty (AONBs), which tend to have poorer quality farmland but thriving tourism industries, such as that found in the Cotswolds.

The latest DEFRA national data on diversification shows that the most common enterprises and average income from each were:

Table 6 - Farm Diversification in England[28]

Type of diversification	% of farms	Average income
Letting buildings for non-agricultural use	43%	£17,900
Processing or retailing of farm produce	9%	£9,700
Sport and recreation	13%	£3,600
Tourism accommodation & catering	6%	£7,000
Solar energy	20%	£2,400
Other renewables	9%	£4,600

[27] Keep M (2009), Farming Diversification in England: statistics, House of Commons Library
[28] DEFRA (2018), Health and Harmony: the future farming and environment evidence compendium

In 2016/17 nearly 2/3rds of farms ran non-agricultural activities generating £620m of additional profit, or £5,860 per farm[29] based on sales of £10,940 per farm on average.

Detailed national data shows that[30]:

- Between 2006/07 and 2016/17 the proportion of English farms with at least one form of diversification rose from 50% to 64%.
- In 2006/07 only 27% of farms had a diversification other than letting buildings, but this had risen to 45% by 2016/17, showing that over this decade more farmers engaged in more active forms of diversification i.e. those in which they ran another enterprise, rather than only letting property to others;
- Diversification accounted for 29% of farm income (£620m) in 2016/17, despite only generating gross output (sales) of £1.19bn or 8% of total farm output. Diversification thus generates a much higher margin than agricultural production;
- Diversification accounted for more than half of farm income for 27% of farms who have diversified and for more than a quarter of farm income for 41% of diversified farms.

Whilst detailed analysis of farm diversification is no longer produced at county level, with 2,529 farms[31], this data suggests that Gloucestershire farms generate an additional £27.7m of turnover and £14.8m of GVA from diversified activities each year, if they have the same level of diversification as farms nationally.

In practice, this is believed to significantly undervalue local farm diversification, because Gloucestershire is prosperous, very accessible and has World class protected landscapes, particularly the Cotswolds, which are very attractive to visitors. As a result its farms are more diversified than in other areas of the country and thus the estimated value of farm diversification in Gloucestershire is estimated as being 50% larger than a national average would suggest, or an estimated £41.5m of additional turnover and £22.2m of GVA in 2017. This has the result of increasing the sector's GVA by over 20%.

Countryside and Tourism

Even, however, after addition of diversification income, the assessment fails to capture much of the value of the farmed landscape. The landscape is critical for the rest of the economy and is 'borrowed' by the wider economy, though both assisting with place making so that the county is attractive to workers and investors, and directly through providing the landscape which attracts tourists. The section below on the rural economy explores these issues further.

[29] DEFRA (2018), Health and Harmony: the future farming and environment evidence compendium
[30] DEFRA (2018), Farm Accounts in England 2016/17
[31] DEFRA (2017), England 2016 County/Unitary Authority datasets

Major Companies in the Gloucestershire Agricultural, Food & Drink Sector

As well as a very large number of SMEs, the Gloucestershire agriculture, food and drink sector has some large and nationally significant organisations and companies. These larger organisations and companies (see annex 1 for full list) are diverse and demonstrate the depth and strength of the sector locally, including:

- As noted above, nationally significant concentration of academic and research organisations including Campden BRI, Royal Agricultural University, Hartpury University and College, and the Countryside and Community Research Institute at the University of Gloucester;
- Cotteswood Dairy with 350 staff and a turnover of £53m operating from four sites;
- Creed Food Service with 360 staff and a turnover of £63m;
- Dairy Partners Ltd with 140 staff and a turnover of £58m;
- Severn and Wye Smokery with 130 staff and turnover of £55m, which has plans for major expansion to over 240 staff;
- Merrydown cider which has a turnover of £38m.

The County also includes sites which are part of larger national or international agrifood groups, including:

- Maastock Arable UK Ltd (Agrii), in Cheltenham is the largest provider of agronomy advice in the UK with 800 employees and a turnover of £297m;
- The Lucozade Ribena factory, with 720 staff and £418m turnover is part of the international Suntory group which employs 42,000 staff;
- Walls Ice Cream with 300 staff is part of Unilever which employs 155,000 staff globally;
- Haygrove which is based just north of Ledbury and which employs 3,000 staff and has a turnover of nearly £100m in the UK and overseas;
- RDS Technology which has 87 employees and turnover of £12m, but is part of the much larger international Topcon group;
- The Agribuggy division of the Alamo Group Ltd which has over 1,000 staff (2,500 globally) in its European division which has a turnover of $170million;
- TH White agricultural machinery is part of a larger UK group with a turnover of £109m;
- Futura Foods, the specialist cheese division of the £48m turnover Nordex Food Group;
- One of five feed mills for Noble Foods, which has a UK turnover of £328m.

The ‘End to End’ Food Chain

The ‘end to end’ food chain is the total chain, from farm to fork, employed in agriculture, food and related industries. For Gloucestershire the estimated scale of the food chain is:

Table 5 - Gloucestershire ‘End to End’ Food Chain 2017

Stage of chain	Employees	GVA £m
Agriculture	6,280	102
Farm diversification	-	22
Agricultural supply	730	48
Professional services: agriculture & the food chain	637	27
Research and academic	1,000	40
Food processing and distribution	6,056	399
Food retail	13,370	358
Food Service	22,250	416
Total	50,323	£1,412m

This data shows that locally the ‘food chain’ from end to end employs just over 50,000 people, or 14.9 % of the workforce compared to 13.2% nationally[32].

The GVA value, £1.41billion in 2017 for Gloucestershire, is 8.8% of the local economy compared to 6.4% nationally[33].

However, this still underplays the true contribution, particularly for farming, given that most farms now also deliver other services to the economy, either through running farm diversification enterprises or through landscape management which supports the wider economy.

The next section includes data on these wider impacts, but is constrained by less detailed evidence than is available for the food chain.

[32] DEFRA (2018), Agriculture in the UK 2017
[33] GFirst LEP (2018), Strategic Economic Plan for Gloucestershire 2.0 - Update 2018

Gloucestershire's Rural Economy

Context for the Rural Economy

A report by the CLA and Barclays Report in 2016, Rural Business 2030[34], reported that the English and Welsh rural economy contained 650,000 businesses, employing 3.4million people. These companies contributed £229billion to English GVA. They also found that the rural economy was investing and that investment rose by 38% between 2012-'15 England and even faster, by +50%, in the South West of England to £2.2billion. The largest barrier to further growth was reported as being planning, which was cited by 49% of businesses.

Rural areas are also increasingly important as providers of natural 'ecosystem services', or in the drive for clean growth. For example:

- Water - with most rainfall landing on farmland, the way that farming operates has major impacts both on preventing flood and ensuring that water is available to support growth. In their August 2018 letter to water companies, DEFRA, OFWAT, DRI and the EA, encouraged all areas to work on including multi-sector planning, in which the needs of all water users and utilising land management to manage water at landscape, scale, should be supported in every region. This puts farmers and land managers at the heart of the water system.
- Energy - the national Clean Growth Strategy (2018)[35] highlights substantial growth in the UK's low carbon economy, with between 2010-'16 the share of low carbon electricity doubling to 47%. In its report in December 2018 on Biomass energy[36], the Committee on Climate Change reported that the share of UK energy demand met by biomass could increase to up to 15% by 2050, double the 2018 rate. They estimate that the UK can produce 27million tonnes of sustainable biomass from 7% of current agricultural land.

Gloucestershire's Rural Population

The rural/urban mix of the population in Gloucestershire[37] is:

- 42.3% of the population, or 252,000 people in Gloucestershire, are classified as living in rural areas, of whom 177,000 live in market towns, villages and sparsely populated areas and 75,000 in Hub Towns[38] which serve predominantly rural areas;

---

[34] CLA (2016), Rural Business 2030: Unlocking Investment, Unlocking Potential
[35] UK Government (2018), Clean Growth Strategy
[36] Committee on Climate Change (2018), Biomass in a Low Carbon Economy
[37] DEFRA (2016), Official Statistics, 2011 Census usual resident population - Lookup for 2011 Rural Urban Classification of Local Authorities
[38] DEFRA (2014), 2011 Rural-Urban Classification of Local Authority, classifies 'Hub Towns' as those with 10-30,000 inhabitants which act as service centres for their rural hinterland

- Two districts are officially classified as 'mainly rural': Cotswold (100% - one of only 27 districts out of 326 nationally to score 100% rural) and the Forest of Dean (95.3% rural and in the top 11% of the most rural districts nationally);
- One 'largely rural district': Tewkesbury (53.1% rural);
- One 'urban with significant rural district': Stroud (42.0% rural);
- Two 'urban with city and town districts': Cheltenham (0.3% rural) and Gloucester (0% rural).

Table 7 - 2011 Population based on Rural-Urban Classification of Local Authorities (DEFRA 2016)

Local Authority	Rural/urban classification	Population				
		Rural	Hub towns	Rural inc. hub towns	Total	% Rural inc. hub towns
Cheltenham	Urban with City and Town	327	-	327	115,732	0.3
Cotswold	Mainly Rural (rural including hub towns >=80%)	65,728	17,153	82,881	82,881	100.0
Forest of Dean	Mainly Rural (rural including hub towns >=80%)	54,803	23,339	78,142	81,961	95.3
Gloucester	Urban with City and Town	-	-	-	121,688	0.0
Stroud	Urban with Significant Rural (rural including hub towns 26-49%)	32,401	14,992	47,393	112,779	42.0
Tewkesbury	Largely Rural (rural including hub towns 50-79%)	23,758	19,778	43,536	81,943	53.1
Totals		177,017	75,262	252,279	596,984	42.3%

The Tourism and Countryside Economy

Natural England have been collecting survey data on green space recreation[39] for many years and their surveys record data broken down by type of visit and total number of estimated visits per year.

[39] Natural England (2017), Monitor of Engagement with the Natural Environment: Headline report from the 2015-16 survey; accompanying technical report

This shows that of an estimated 3.1billion visits in 2015/16, the most commonly cited activities (visitors can select more than one activity), were:

- 1.35billion visits to the countryside (44%)
- 1.22billion visits to town or city green space (39%)
- Dog walking 1.51billion visits (48%)
- 879 million visits to parks in towns and cities (28%)
- Walking (no dog) 869million visits (28%)
- 519 million visits to paths, cycleways and bridleways (17%)
- 446million visits to woodlands and forests (14%)
- 312million visits for childrens play activities (10%)

This national data is interesting as it shows a clear focus on informal recreation in the natural environment, with most seeking a green, natural environment.

In Gloucestershire, access to the countryside, nature and smaller rural settlements is a key attraction of the area. The Cotswolds and Forest of Dean in particular, appeal to visitors due to their mix of tranquility, historic villages and market towns, landscape and food and drink offer.

Studies of the Gloucestershire tourism sector[40] shows Gloucestershire:

- Had 20,349,000 day and staying visitors in 2017;
- This supports business turnover of £1.55 billion a year and 19,705 FTE jobs.

Of total tourism spend, £341m is spent on catering services, or 32% of the total. This clearly has a direct link back to the food chain. Specialist trade bodies such as Cotswold Taste[41], with 80 producer and support members, are important in promoting this link between landscape, food provenance and the food consumer.

Data on the tourism sector shows that the two most rural districts, Cotswold and Forest of Dean, represent 43% of total direct tourism spending in Gloucestershire, against only 33% for the two urban districts of Cheltenham and Gloucester.

Given that both Cheltenham and Gloucester are much larger in population terms, this shows how comparatively important tourism is to the most rural districts in Gloucestershire, based on their farmed landscape, built heritage, cultural and food and drink offer.

[40] The South West Research Company Ltd (November 2018), The Economic Impact of Gloucestershire's Visitor Economy 2017, Cotswold District Council
[41] https://www.cotswoldtaste.co.uk/

Table 8 - Gloucestershire Tourism Direct Spend 2017[42]

District	Staying visitors		Day visitors		Total direct spend[43] £m	
	Visitor nights (millions)	Spend £m	Numbers (millions)	Spend £m	Tourists	of which, food & drink
Cheltenham	1.04	79.6	1.80	73.5	153.1	44.0
Cotswold	1.77	137.3	6.46	189.1	326.4	109.0
Forest of Dean	0.97	62.7	2.25	68.9	131.6	42.3
Gloucester	0.92	67.9	3.20	129.6	197.5	62.1
Stroud	0.74	47.0	2.67	88.8	135.8	45.6
Tewkesbury	0.88	65.5	1.84	59.2	124.7	38.1

The importance of protected landscapes was also estimated in a 2013 study of the value of the Cotswold AONB[44]. The Cotswold AONB stretches across parts of Gloucestershire and Oxfordshire, is Britain's largest AONB at 2,038square kilometres and is the 2nd largest protected landscape in the UK. The report found that:

- The Cotswold economy has 9,500 companies employing 54,000;
- The estimated turnover of companies in the AONB was £5.3billion and this generated a GVA of over £2billion;
- 48% of companies surveyed claimed to use the 'Cotswold' brand a lot when promoting their goods and services. For tourism companies they found the figure was 62%, with 29% suggesting that the brand helped to increase their turnover by at least 15%;
- Of the total jobs and GVA in the AONB, 9,500 jobs and GVA of £337million were considered to be very dependent on maintaining the quality of the landscape in the AONB.

[42] The South West Research Company Ltd (November 2018), The Economic Impact of Gloucestershire's Visitor Economy 2017, Cotswold District Council
[43] Direct spend means spending before indirect and induced impacts
[44] Cumulus Consultants, GHK Consulting Ltd (2013), Assessment of the Economic Value of the Cotswolds AONB, final report for Cotswold Conservation Board

The Mix of the Gloucestershire Economy by District

The mix of the wider economy is relatively distinct by district within Gloucestershire. The table below shows a heat map for the workforce in each broad sector by district, with darker colours illustrating a higher concentration of the sector and lighter colours a lower concentration of the sector:

Table 9 - Major Sectors of the Economy by District level Employment in Gloucestershire[45]

Sectors	Urban		Mix rural & urban		Rural	
	Gloucester	Cheltenham	Stroud	Tewkesbury	Cotswold	Forest of Dean
Agriculture & manufacturing of which:	6.4%	5.9%	22.4%	21.8%	11.8%	22.8%
Agriculture	0.1%	0.1%	2.8%	2.2%	4.7%	6.9%
Manufacturing	6.3%	5.8%	19.6%	19.6%	7.1%	15.9%
Distribution & hospitality of which:	26.5%	27.7%	24.9%	23.4%	32.6%	22.8%
Wholesale/retail	17.4%	16.5%	13.7%	13.1%	16.5%	11.9%
Transport/storage	2.8%	1.3%	2.4%	3.8%	1.9%	4.0%
Accommodation & hospitality	6.3%	9.9%	8.8%	6.5%	14.2%	6.9%
ICT	4.0%	6.6%	3.4%	3.8%	4.7%	2.8%
Finance/insurance	5.6%	4.9%	0.9%	4.4%	4.1%	1.6%
Construction	4.8%	3.7%	6.9%	7.6%	5.3%	5.9%
Real estate	1.3%	1.6%	1.0%	1.0%	2.4%	1.4%
Professional & scientific	4.8%	9.9%	6.9%	9.8%	9.4%	5.9%
Admin & support services	7.9%	8.2%	6.9%	6.5%	5.9%	5.9%
Public admin	6.3%	1.0%	1.8%	2.7%	1.4%	2.4%
Education	7.1%	11.5%	8.8%	5.4%	8.3%	11.9%
Health & Social	19.0%	14.8%	9.8%	9.8%	7.1%	11.9%
Arts & entertainment	1.4%	1.6%	2.9%	1.3%	3.5%	2.0%

The table above shows some interesting variation by sector, some of which is expected based on national data (e.g. agriculture is concentrated in rural areas), but in other sectors, there are some interesting and different conclusions which can be drawn:

45 Gloucestershire employment (ONS Business Register and DEFRA) (2018)

- Not surprisingly agriculture is concentrated in the most rural districts, with both Cotswold and the Forest of Dean particularly dependent on this sector compared to nationally;
- What is maybe less expected is that manufacturing is concentrated in three districts: the mixed urban/rural districts, Stroud and Tewkesbury; and, the rural Forest of Dean.
- This mirrors national work which has shown that manufacturing is increasingly found in rural areas and not in larger towns from which it has largely been displaced. The very high reading in the Forest of Dean is particularly interesting and shows that this very rural district is very dependent on manufacturing. This focus on manufacturing (and the diversity of the rural economy) is also supported by work by the Forest of Dean Economic Partnership which has identified a top 30 list of local companies, most of which are not agrifood or quintessentially rural companies (annex 2). The local economic profile for the Forest of Dean[46] also reports this focus on manufacturing, with the employment in the manufacturing sector, at 16%, much higher than the national urban average of 8% or even the national rural average of 12%.
- The distribution and hospitality sector is the strongest in Cotswold, due mainly to very strong readings for both wholesale and retail and accommodation and hospitality sub sectors;
- ICT is particularly strong in two districts, Cheltenham and maybe surprisingly also in Cotswold, one of the most rural districts in England;
- Finance and insurance is not surprisingly highest in the larger urban areas of Gloucester and Cheltenham, but also comparatively strong in Tewkesbury and Cotswold;
- Construction is strongest in the two mixed urban/rural districts of Stroud and Tewkesbury, but also maybe surprisingly stronger in Cotswold and the Forest of Dean than in the urban focused districts. Also maybe surprisingly the real estate sector is strongest in Cotswold;
- Professional and scientific employment is normally focused in larger urban areas, but in Gloucestershire, whilst Cheltenham has a large presence in this market, its concentration is nearly equaled by both Tewkesbury and Cotswold. This strong showing in parts of the rural economy is believed to be due to some nationally significant agrifood and rural research and academic centres (see detail above);
- Public administration and health and social care, are in common with other parts of the UK, concentrated in the County town and larger urban areas given the concentration in larger centres which the NHS has focused on over the last few decades;

[46] Rural Services Network (2018), Forest of Dean Economic Profile

- Surprisingly and in contrast to most rural counties, in Gloucestershire the district with the highest concentration of employment in education is in the second most rural district in the county, the Forest of Dean;
- In many areas arts and entertainment is also concentrated in larger urban areas, but in Gloucestershire, the district with the highest concentration on this sector is the most rural; Cotswold, with the mixed/urban rural district of Stroud in second place, and both of these districts having at least double the number of their employees in this sector as is found in Cheltenham and Gloucester.

This analysis suggests that, contrary to common perception, the rural economy of Gloucestershire is diverse and has real strengths in several including manufacturing, wholesale, retail, accommodation, professional and scientific, education, arts and entertainment, which many people would expect to find concentrated in urban areas.

The focus of some of this rural employment concentration is in sectors, such as professional and scientific, accommodation and education, which are seen as important growth sectors nationally. Furthermore, in the case of professional and scientific and education, these sectors are seen as central to efforts to address the UK's productivity challenge. They are also critical in allowing workers across the economy to apply innovation and to gain the skills needed to support future growth, wage growth and to facilitate the delivery of the national Industrial and Clean Growth Strategies.

The Scale of the Rural Economy of Gloucestershire

It is difficult to accurately assess the value of the Gloucestershire rural economy, because the data available from ONS at smaller spatial levels does not split economic output by rural and urban areas. There is also a challenge in the use of SIC codes and company reporting, as many companies report activity for their whole operation based on their HQ, even if they operate across a mix of rural and urban areas. Furthermore, many companies operate services under multiple SIC codes, but do not split their turnover or costs on this basis.

Measures which are useful are job density[47], with this measure for Gloucestershire showing[48] very strong local jobs markets which provide more jobs than the local working age population for Cotswold 1.02, Cheltenham 1.01 and Tewkesbury 0.99. In contrast, Gloucester 0.85, Stroud 0.85 and Forest of Dean 0.55, all have fewer jobs than local workers, signifying a degree of out commuting for work.

[47] Job density is the number of jobs as a ratio of the 16-64 age group, with a number over 1.0 signifying inward travel for work as the local jobs market has more jobs than local potential employees
[48] NOMIS, Labour Market Profile

Table 10 Resident Population and Jobs by District 2017[49]

District	Total Population	Jobs	Jobs density	% of district classified rural
Cotswold	87,500	52,000	1.02	100%
Forest of Dean	86,000	28,000	0.55	95.3%
Tewkesbury	90,300	53,000	0.99	53.1%
Stroud	118,100	60,000	0.85	42.0%
Cheltenham	117,100	75,000	1.01	0.3%
Gloucester	129,100	70,000	0.85	0%

In Cotswold's case it can be assumed the jobs are all part of the rural economy and at least 90% of those in the Forest of Dean. At the other extreme, none of the jobs in Gloucester or Cheltenham are directly rural (but may support the rural economy through providing specialist services). In Tewkesbury and Stroud it is assumed 75% of the jobs are concentrated in the urban parts of these districts and 25% in the rural areas.

Based on these assumptions, it is estimated that the rural economy supports 105,000 jobs or just over 30% of the total jobs in Gloucestershire (338,000).

Major Companies in the Gloucestershire Rural Economy

As well as a very large number of SMEs, the Gloucestershire rural economy contains some large and nationally significant organisations and companies. These larger organisations and companies (see annex 1 for full list) are diverse and demonstrate the depth and strength of the rural economy locally, including:

- Gloucester services is part of Tebay services which employs 1,100 staff nationally;
- Major attractions such as Highgrove Royal Gardens, National Trust Hidcote Gardens, Cotswold Farm Park;
- Renishaw which has over 2,000 staff and a turnover of £537m;
- FP McCann based in Lydney with 1,374 staff and a turnover of £216m;
- Bell contracting which focuses on agrifood construction projects and has 400 staff and a turnover of £40m.

49 NOMIS, Labour Market Profile

Conclusions

The Gloucestershire Agrifood supply chain employs just over 50,000 people, or 14.9% of the workforce compared to 13.2% nationally. The food chain generated a GVA of £1.39billion in 2017, or 8.8% of the local economy, higher than the 6.4% seen nationally. The agrifood sector is thus more important to the local economy than it is nationally.

There is a distinction between traditional and quintessentially rural sectors such as agriculture and forestry and the *rural economy*. Farmers have diversified and the rural economy itself has attracted new industries, such as ICT employment in the Cotswolds. The rural economy is broad and contains high growth, knowledge intensive companies. As shown by Barclays and the CLA in 2016, the rural economy is growing and investing with strong growth in the SW.

More broadly, circa 30% of Gloucestershire's employment is in the rural economy. Locally the rural economy is very diverse, with strengths in areas including manufacturing, wholesale, retail, accommodation, professional and scientific, education, arts and entertainment, all sectors which are more normally expected to be concentrated in urban areas.

Concentration of manufacturing and education in the Forest of Dean, ICT in the Cotswolds and a nationally significant strength in agrifood and rural economy academic and research centres across the county are clear indications of the dynamism of the local rural economy.

The tourism and visitor economy, which is important not only in its own right, but as a key enabler of wider economic growth through its contribution to place making, is concentrated in rural areas of Gloucestershire. In particular it is vital to the Cotswold economy where tourists spent over £326m in 2017. Tourism also has a direct link to agrifood, with 32% of tourist spending in Gloucestershire being devoted to food and drink.

Whilst many of the companies in these rural sectors are SMEs, the sector includes large national and internationally significant companies including the largest agronomy business in the UK, Agrii, Lucozade Ribena, Unilever (Walls Ice Cream) and a raft of medium to large scale food producers with growth potential such as Severn and Wye Smokery and Cotteswood Dairy.

The rural economy has substantial potential for growth through:

- Embracing the global demand for new technology in the food chain, for example the need for cyber security as digitalisation pervades every aspect of the food chain;
- Growing high value tourism by promoting Gloucestershire's year round attractiveness through its landscape, food offer and heritage as short breaks and longer stays grow;
- Adding value to food and drink through investing in added value processing;
- Building on the potential to grow manufacturing as Industry 4.0 leads to reshoring.

Appendix 1 - AgriFood Companies in Gloucestershire

Gloucestershire AgriFood & Rural Business Economy - top 25

1. Masstock Arable UK Ltd (Agrii), Agronomy firm with 800+ staff and 300+ agronomists/advisors, working with 20,000+ farms across the UK. Had turnover of £297 million in 2017. (Masstock Arable (UK) Ltd. Andoversford, Cheltenham, GL54 4LZ) http://www.agrii.co.uk/
2. RDS Technology: developer and manufacturer of intelligent measuring, control and weighing solutions for global agriculture and industrial applications. A subsidiary of Topcon Agriculture with turnover of £11.8 million in 2017 and 87 employees. (RDS Head Offices & Factory, Topcon Technology Ltd, Cirencester Road, Minchinhampton, Stroud, Gloucestershire. GL6 9BH) https://www.rdstec.com
3. TH White (Agriculture) Ltd: Machinery Dealership specialising in New Holland, Case IH, Vaderstad, Kuhn, Pottinger, Manitou, McConnel and Honda. Part of the TH White group which operates across the south west, with turnover of £108.7 million in 2017 and c450 employees. (Culls Meadow, Toddington, Cheltenham, GL54 5BZ) https://www.thwhiteagriculture.co.uk/
4. Alamo Group Europe (Ltd) (Kellands Agricultural Ltd): Alamo group an American based agricultural company with 18 plants across North America and Europe and 2,500+ staff acquired Kellands who are the producers of the Agri-buggy sprayer in 2014. Incorporating it into their European division which consists of 8 companies across the UK and France with almost 1,000 staff and turnover of $170 million between them. (Kellands Agricultural Ltd, Brimpsfield Road, Birdlip, Gloucestershire, GL4 8JH, England UK) https://www.alamoeur.com/home/uk-agricultural-division/kellands
5. Royal Agricultural University and Farm 491: The RAU is the oldest agricultural higher educational establishment in the UK, with 1200 students. It runs farm 491 as a hub to connect its students and the wider food and farming industry for innovation making use of the University 491 ha farm as a testing facility for experimentation, as well as the provision of office and workshop space for these undertakings.
6. Hartpury University & College: Higher education institution offering courses including agriculture, veterinary, and equine. With 3,600 students and a 360-ha campus. A new agri-tech centre is due to launch in September 2019 (Hartpury University and Hartpury, College, Gloucester, GL19 3BE) https://www.hartpury.ac.uk/college/

7. Campden BRI: provide scientific and technical support to the food and drink industry, including analysis and testing, operational support, knowledge management and research and innovation services with a team of more than 300 consultants and specialists, Turnover of £22.7million in 2017 and a total of 400 staff (Campden BRI, Station Rd, Chipping Campden, Gloucestershire, GL55 6LD, UK) https://www.campdenbri.co.uk/

8. Countryside and Community Research Institute: The Countryside and Community Research Institute (CCRI) is a collaboration between the University of Gloucestershire, the Royal Agricultural University and Hartpury College for the purposes of research, education and knowledge exchange, it has 26 staff, and has received funding from horizon 2020, Defra, other national agencies and 3rd party private donors (Countryside and Community Research Institute, University of Gloucestershire, Francis Close Hall campus, Swindon Road, Cheltenham, Gloucestershire GL50 4AZ)

9. Haygrove: Haygrove is a fruit producer producing cherries and berries over 500 ha of farms. They also design and manufacture polytunnels. They operate in UK, Portugal, South Africa and China. Haygrove turned over £97.8 million in 2017 and employs over 3,000 staff. In Gloucestershire is Haygrove Newent a 52ha nursery site producing strawberries, blackberries and raspberries under a mixture of tunnels and glasshouses employing up to 650 staff during peak times, it is also Haygrove's plant propagation nursery. https://www.haygrove.com/

10. Walls Ice Cream is part of multinational food group Unilever. The ice cream division in Gloucester employs 300 staff. The wider Unilever group operates globally, employs 155,000 staff and had 218 revenues of over €50billion (Buchacan Galleries, Buchacan Street, Gloucester, GL4 3BW)

11. Cotteswold Dairy: Family owned Dairy business employing 350+ staff and a turnover of £52.5million in 2017, operating across 4 depots stretching all the way to north Wales, with the head office being in Tewkesbury. (Dairy Way, Northway Lane, Tewkesbury, Gloucestershire GL20 8JE) http://cotteswold-dairy.co.uk/

12. Creed Foodservice Limited, Independent delivered food wholesale business, with a Turnover of £62.7million in 2017, c360 staff of whom half are based in Gloucestershire. (Staverton Technology Park, Cheltenham Road, Staverton, Cheltenham, Gloucestershire, GL51 6TQ) https://www.creedfoodservice.co.uk/

13. Dairy Partners Ltd: Dairy company producing cheese products for the UK and overseas markets, including cheese products for pizzas and pastas. Turnover of £57.7 million in 2017 and c.140 staff, (Dairy Partners, Brunel Way, Stroudwater Business Park,, Stonehouse, Gloucestershire GL10 3SX) http://www.dairypartners.co.uk/

14. Severn and Wye smokery: Salmon and fish smokery and restaurant situated between the Severn and Wye rivers with a turnover of £55million in 2017 and c.130 staff. (Severn & Wye Smokery**,** Chaxhill, Westbury-on-Severn, Gloucestershire, GL14 1QW) http://severnandwye.co.uk/ Has plans for major expansion to over 240 staff at Lidney
15. Futura Foods: one of the largest suppliers of continental cheese to the UK and Ireland, owned by the Nordex Food group, Turnover of £48.3million in 2017 (The Priory, Long Street - Dursley, - Gloucestershire - GL114HR) https://futura-foods.com/
16. Merrydown: Cider marketing company with a turnover of £37.8 million in 2017, (Merrydown PLC, Manderson House 5230 Valiant Court, Delta Way, Brockworth Gloucester, GL3 4FE) https://www.merrydown.co.uk/
17. Noble Foods Ltd: Noble foods is one of the UK's largest food manufacturers in the UK with £328 million turnover in 2017, producing more than 750,000 tons of animal feed per year, rearing more than 4 million pullets per annum and processing more than 60 million eggs per week. At Coleford in Gloucestershire is one of noble foods 5 mills in the UK which produce 750,000 tons of feed between them. https://www.noblefoods.co.uk
18. Lucozade Ribena Suntory: Part of the Suntory group a worldwide group operating 337 holding companies with 42,000 employees. LR Suntory operates 3 sites across the UK and ROI including a site at Colesford which employs 330 staff producing beverages, and had turnover of £418.4 million in 2017 and 720 total staff. The Royal Forest Factory, Coleford GL16 8JB https://www.lrsuntory.com/
19. Gloucester services: Part of Tebay services, a rural centred motorway services group descended from a Cumbrian family farm which now operates six services and employs 1100+ staff. Operates at Gloucester services, a farm shop selling produce sourced from within a 30-mile radius from more than 130 local producers. https://www.gloucesterservices.com
20. Daylesford Farmshop & Café: Organic run farm and farmshop with turnover of £25.9 million in 2018 and 315 employees.(Daylesford near Kingham, Gloucestershire GL56 0YG) https://www.daylesford.com
21. SOHO Coffee Co: Organic fairtrade coffee house and company, with coffee shops across the UK and Ireland, Spain and Doha. Revenue of £8.9 million and c.300 staff Unit K, Ashville Trading Estate The Runnings, Cheltenham. GL51 9PT http://sohocoffee.com
22. Wynnstay: Wynnstay group manufactures and sells a range of agricultural products to UK farmers and the wider rural economy, as well as providing agricultural services such as agronomy and analysis with a turnover of £239.6 million in 2017 stores across the country, including a store in Tetbury. https://www.wynnstayagriculture.co.uk

23. Bell Contracting: construction and groundwork specialists (Including significant presence and experience in construction of agricultural and agri-food premises) with a staff of more than 400 staff and turnover of £40million in 2017. (Whimsey Industrial Estate, Steam Mills Rd, Cinderford Gloucestershire GL14 3JA) http://www.bellcontracting.co.uk/
24. Renishaw, rural based 3d printing technology engineering company with 2,000+ staff employed in Gloucestershire. Turnover of £536.8million in 2017 (New Mills Wotton-under-Edge Gloucestershire United KingdomGL12 8JR) www.renishaw.com
25. FP McCann: One of the UK's largest manufacturers and suppliers of precast concreter solutions manufacturing across 12 UK locations supplying building materials to the UK construction and civil engineering industries including for agricultural and agri-food use. With turnover of £215.8 million in 2017 and 1,374 employees. (Walling Enquiries, GB Agricultural Enquiries, Lydney Industrial Estate, Harbour Road, Lydney, Gloucestershire, GL15 4EJ) https://fpmccann.co.uk

Other Companies and Organisations in the Gloucestershire AgriFood & Rural Economy

Business Support Organisations including Agri-services & AgriTech
26. Cotswold Taste: A member owned not for profit cooperative which provides business advice, marketing and promotional support(6 Bridge Close, St John's Priory, Lechlade, Gloucestershire GL7 3EZ) https://www.cotswoldtaste.co.uk/
27. Pasture-Fed Livestock Association: Association bringing together British pasture farmers, with their own in-house quality assurance. Turnover of £100k and 2 employees (Trent Lodge, Stroud Road, Cirencester GL7 6JN United Kingdom) https://www.pastureforlife.org
28. Bruton Knowles: A National property consultant and specialist servicing all sectors of the UK property market. (Commercial, Rural, Residential, etc) Bruton Knowles is a LLP, and BK service company is limited private company which had turnover of £9.2 million in 2017 and 150 staff https://www.brutonknowles.co.uk/ (Olympus House Olympus Park Quedgeley Gloucester GL2 4NF)
29. Gloucestershire Rural Community Council: Charitable company dedicated to helping Gloucestershire's communities. Part of ACRE. (Gloucestershire Rural, Community Council, Community House, 15 College Green, Gloucester GL1 2LZ) http://www.grcc.org.uk/

30. Gloucestershire Wildlife trust: Trust responsible for the protection and advancement of knowledge surrounding wildlife and habitat. Operates 60 nature reserves, organises more than 100 outreach events a year and interacts with 3,000+ schoolchildren per year. (Gloucestershire Wildlife Trust, Conservation Centre, Robinswood Hill Country Park, Reservoir Road, Gloucester, GL4 6SX) https://www.gloucestershirewildlifetrust.co.uk/
31. Happerley: Happerley is a food and drink services organisation which is dedicated towards establishing provenance in the UK food and drink industry, connecting all UK producer and produce organisations, certifications and schemes. They have a research and technology unit at farm 491, RAU. https://happerley.co.uk/ (Willow Hill Farm, Apperley, Gloucester, GL19 4DJ)
32. Direct Farm Supplies Ltd: A agricultural supply servicer supplying farmers, equestrians and smallholders with animal feeds, supplements and equipment. (Olympus Park, Quedgeley, Gloucester, GL2 4AL) https://www.directfarmsupplies.co.uk
33. Henry Cole and Co Ltd: Distributor of animal feeds throughout Wales and the South West supplying over 1200 product lines. http://www.henrycole.co.uk (Cotswold Centre/Purlieus Farm, Cirencester GL7 6BY)
34. Agricultural supply services ltd: Supplier of agricultural equipment including meters, pest control, fuel stations, lighting, grain stirrers, etc. https://www.agrisupplyservices.co.uk/ (Agricultural Supply Services, Church Cottage, Whitminster, Gloucester, GL2 7PN)
35. Claas Western: part of the claas dealer and servicing network, operating across 7 counties with 4 stores and more than 80 staff, and £34.7 million turnover in 2017. (Cotswold Agricultural Centre, Spine Road Junction, Cirencester,GL7 5QA) https://www.western.claas-dealer.co.uk/
36. Agrigame UK ltd: Agrigame is a retailer of agricultural supplies and game rearing equipment, Agrigame UK Ltd, Cromer Farm, Pendock, Glos, GL19 3PG http://www.agrigame.co.uk/
37. Postsaver Europe Ltd: Producer of sleeves to go on posts and poles at the ground line to prevent rot and premature removal. Unit 11, the Hawthorns, Staunton, Gloucestershire, GL19 3NY. https://www.postsaver.com
38. Green Fuels Ltd: Producer of biodiesel production equipment with existing installed units producing 350million litres of diesel per year. Including several units belonging to HRH the Prince of Wales from whom they hold a warrant. http://greenfuels.co.uk (B21 Gloucestershire Science and Technology Park, Berkeley Green, Berkeley, Gloucestershire, GL13 9FB)

39. Stow Agricultural Services: Supplier of more than 12,000 products for farmers, landowners and the rural community. https://www.stowag.com/, (Eastgate House, Moreton Road, Longborough, Gloucestershire, GL56 0QJ)
40. Abbot & Co (Wessex) Ltd: Hay, Straw and agricultural merchant with a nationwide series of agents covering the UK. (Abberley House, Park St ,Cirencester, Gloucestershire GL7 2BX) http://www.abbottwessex.co.uk
41. JJ Farm Services Ltd: Small family run machinery dealership with a small team specialising in Kubota tractors and implements. (Far Stanley, Winchcombe, Cheltenham GL54 5HF) http://www.jjfarm.co.uk/
42. P & D Engineering (Bredon) ltd: Agricultural engineer and machinery dealership specialising in Merlo telehandlers, McCormack tractors and Vicon grass equipment amongst others. (Fleet Lane, Bredon, Tewkesbury, Gloucestershire, GL20 7EF) https://www.panddengineering.com/
43. Gloucester Lift Trucks: Agricultural machinery dealership and servicing, specialising in ARTISON (Toyota) Forklifts and EP Forklifts. (Unit 8 Rectory Farm Works, Bisley, Nr Stroud, Gloucestershire, GL6 7AS) https://www.gloucesterlifttrucks.co.uk
44. Severn Agriculture: Specialist in agricultural crop spraying equipment parts and servicing, as well as an approved NSTS test centre for the testing of sprayer and fertiliser equipment. (Windmill Farm, Hartley Lane, Sevensprings, Cheltenham, GL53 9NF) http://severnagriculture.co.uk
45. Albutt: Farm machinery attachment producer with almost 60 members of staff operating from two manufacturing sites. (Great Washbourne, Nr Tewkesbury, Gloucestershire, GL20 7AR, United Kingdom) http://www.albutt.com/
46. Cleanacres Machinery Ltd: Specialist in the supply of used/second hand spraying equipment, as well as operating a NSTS testing centre for sprayers. (Unit 4, Dowmans Farm, Coberley, Cheltenham, GL53 9QY) http://cleanacres.co.uk/
47. Protech Machinery Ltd: Producer of post knockers and fence building equipment founded in 2003 now with turnover of £3.8 million in 2016 (Woolridge Farm, Gloucester Road, Hartbury, GL19 3BG) http://www.protechmachinery.co.uk/
Farming, Food and Drink Manufacturing
48. Hobbs Dairy: Family farm, with 200 "free range" cows supplying milk into Cotteswold Dairy, (BARHOUSE FARM, ELMORE, GLOS, GL2 3NT) https://www.hobbsdairy.com/

49. Cotswold Wagyu: Mixed Farm which since the millennium has switched Dairy for Wagyu beef production with the importation full blood Wagyu embryos to create a small pedigree herd as well as the crossing of a Wagyu Bull with Angus cattle for beef production. (Church Farm, Long Newnton, Tetbury, GL8 8RS) https://www.cotswoldwagyu.co.uk
50. MacroMeals: Meal prep delivery service operating throughout the UK founded in 2016 by Thomas Eddolls. Incorporated in October 2018, https://www.macromealsuk.co.uk (Unit 3, Church Street, Gloucester, GL2 5RB)
51. Wickwar Brewing (Wessex Brewing Co.) Traditional brewing company supplying 18 pubs. (The Old Brewery, Station Road, Wickwar, Gloucestershire, GL12 8NB) http://wickwarbrewing.com/
52. Beau's Bakehouse: A small bakery supplying cakes and other bakes to sell online and through other local cafes, shops and farmers markets, with 6 staff (Unit 1, Tanhouse Farm, Frampton on Severn, Gloucestershire, GL2 7 EH) https://www.beausbakehouse.co.uk/
53. Coppernose: Beef jerky producers (startup company, member of farm 491, established by Liam Coppernorse after graduating RAU), (Coppernose smokery, Cirencester, Gloucestershire) https://coppernose.com
54. Corinium Ales: Small craft brewery operating since 2012, now with 3 full time staff as well as seasonal staff, selling direct from the brewery (via it's shop and tours) and through pubs and restaurants in the locality as well as Cirencester and Stroud farmers markets and CAMRA festivals. (Unit 1a, The Old Kennels Cirencester Park, Stroud Road Gloucestershire, GL7 1UR) http://www.coriniumales.co.uk
55. Capreolus Distillery: Small distillery producing Eaux de Vie and botanical and fruit gins. (The Mount, Park View, Stratton, Cirencester, GL7 2JG) http://capreolusdistillery.co.uk
56. Stroud Brewery: Brewery and tap room established in 2006, now with a purpose built brewery and bar, and a team of 14 staff. (Kingfisher Business Park, Thrupp, Stroud, Gloucestershire, GL5 2BY) https://www.stroudbrewery.co.uk/
57. Severn Brewing Ltd: Brewery company now producing 5 beers with a team of 4 staff. https://s7n.co.uk (Tortworth Business Park, Tortworth, Wotton-under-Edge, Gloucestershire, GL12 8HQ)
58. Poulton Hill Estate, Poulton Hill Estate, Poulton, Cirencester, GL7 5JA: Vineyard and sheep farm producing 20,000 bottles of wine per annum from 8,800 vines. https://poultonhillestate.co.uk/

59. Godsells Cheese: Family run Dairy farm producing a range of handmade cheeses with a team of 8 people. Selling cheese through local farm shops, restaurants and independent retailers as well as local branches of the Cooperative and Waitrose and John Lewis. (Godsells Cheese, Church Farm, Leonard Stanley, Stonehouse, Gloucestershire, GL10 3NP), http://www.godsellscheese.com
60. Native Breeds: Small scale family run Charcuterie with organic certification on the Lydney Estate, producing a range of products from British native and rare breeds. http://www.nativebreeds.co.uk (The Old Workshop, Lydney Park Estate, Lydney, GL15 6BU)
61. The Ingredients Consultancy: Supplier of premium grade food ingredients to the food, nutritional and pharmaceutical industries throughout the UK and Eire, https://www.theingredients.co.uk/ (Tewkesbury, GL20 6YQ)
62. Shipton Mill Ltd: Speciality miller of organic flour using a restored mediaeval mill. https://www.shipton-mill.com/ (Long Newnton, Tetbury, Gloucestershire, GL8 8RP)
63. R Oil: family business, Producers of cold pressed rape seed oil, supplying oil to several restaurants, universities as well as the House of Lords. http://www.r-oil.co.uk/ (R-Oil, Swell Buildings Farm, Lower Swell, Stow on the Wold, Gloucestershire, GL54 1HG)
64. I Love Italia Ltd: Founded in 2011 by a Milanese expat to supply high quality Italian ingredients to food wholesalers and restaurants. http://www.iloveitalia.co.uk/ (Unit 2, Battle Brook Drive, Chipping Campden, Gloucestershire, GL55 6JX)
65. Barnes Williams (UK and Far East) Ltd: Specialist supplier of culinary herbs and spices, onions, tomatoes and chillis. (Barnes Williams (UK & Far East) Ltd, Unit E, Liddington Industrial Estate, Old Station Drive, Leckhampton, Cheltenham, GL53 0DL) http://barneswilliams.co.uk/
66. Hobbs House Bakery: Bakery Chain across Gloucestershire, Wiltshire and Bristol with 6 shops, including 2 in Gloucestershire. https://www.hobbshousebakery.co.uk/
67. Drapers Bakery Ltd: Wholesale Bakery with more than 200 years of baking experience between its staff. (Unit 3, Northway Lane, Northway, Tewkesbury, GL20 8HA) https://www.drapersbakery.co.uk
68. J & M Provisions Ltd: Food manufacturer supplying over 1500 products to a wide range of businesses, (4 Spinnaker Rd, Gloucester GL2 5FD)
69. European Foods Ingredients Ltd: supplier of dehydrated raw materials to the food industry, specialising in fruit, vegetables, pulses, herbs and spices (European Food Ingredients Ltd.4f Delta Drive, Tewkesbury Business Park, Tewkesbury, GL20 8HB) http://www.efiltd.com

70. Kitchen Garden foods ltd: Kitchen Garden offer a large range of jam, chutney, marmalade, and dressings (Salmon Springs, Stroud, Glos, UK, GL6 6NU) https://www.kitchengardenfoods.co.uk
71. Selsey Foods: Producers of chutneys, syrups, jams, marmalades and condiments. https://www.selsleyfoods.com (Darcy Lodge, Duntisbourne Abbots, Cirencester Gloucestershire, GL7 7JW)
72. Gloucester Sausage Co: Family owned butcher, delicatessen and cider makers, producing the Gloucester old spot sausage. (1 Knightsbridge Business Centre, Knightsbridge Green, Knightsbridge, Cheltenham, Gloucestershire GL51 9TA) http://www.thegloucestersausagecompany.co.uk
73. Hot Headz: Producer of spicy sauces holding the widest selection of speciality hot sauces on the UK. (Units F3-F5, Phoenix Trading Estate, London Road, Stroud, Glos. GL5 2BX.) https://www.hot-headz.com/
74. Taste Connection Ltd: Supplier of provenance ingredients to the food industry, with a team of 15 staff producing products in a specially converted 16th barn (TASTECONNECTION LTD, MILL STREAM HOUSE, ALDERLEY, WOTTON UNDER EDGE, GLOUCESTERSHIRE, GL12 7QT.) https://tasteconnection.co.uk/
75. TruffleHunter Ltd: producer of truffle infused oils, mustards, mayonnaise and salts supplying to specialist retailers and restaurants across the globe. https://trufflehunter.co.uk/ (TruffleHunter Ltd, Lakeside Business Park, South Cerney, GL7 5XL)
76. Coln Valley Smokery Ltd: Artisan smoked salmon and poultry producer. https://www.colnvalley.co.uk/ (Far Peak, Cheltenham, GL54 3JL)
77. The Authentic Bread Company: Environmentally minded 100% Organic bakery founded in 1995 producing a wide range of baked foods including vegan and gluten free products using two wood pellet burning bread ovens. (The Authentic Bread Company, Strawberry Hill, Newent Gloucestershire, Gl18 1LH) https://www.authenticbread.co.uk/index.html
78. Tubby Toms: Recently founded company (2015, full time 2017) producing handmade sauces and seasonings with turnover of £33,612 in 2018 representing c.160% growth on 2017. (Tubby Tom's ltd, 15 Foley Rise, Hartpury, GL19 3DW.) https://www.tubbytoms.com/
79. The Bespoke Brewing company: Traditional small brewery with a team of 3 staff located in the forest of dean, also operating its own bar every Friday which is also available for hire. (Unit 5, The Mews, Mitcheldean, Gloucestershire, GL17 0SL) https://bespokebrewery.co.uk/

80. Hillside Brewery: A small local brewery founded in 2014 with 5 members of staff, operating with an environmental ethos ensuring that they are a net exporter of energy to the grid and that waste is at a minimum including the use of spent malt as cattle feed, whose milk is then used to make their beer ice cream. (Holly Bush Farm, Ross Road, Nr. Longhope, Gloucestershire GL17 0NG) https://www.hillsidebrewery.com/
Food and Drink Retail, Wholesale and Catering
81. Batchseed: An upcoming online marketplace where consumers can buy direct from producers, with access to enhanced information on provenance and production methods through updates from producers who will be able to upload updates about their farm/nursery etc. http://www.batchseed.com (Trent Lodge, Stroud Road, Cirencester, England, GL7 6JS)
82. The Craft Drink Co., new start up (4 years old), with £4m turnover and selling a wide range of craft drinks sourced from Gloucestershire and neighbouring counties http://www.craftdrink.co.uk
83. Over Farm: A diversified farm running a farm shop, engaging in catering, education and events including weddings as well as providing instruction in microlight piloting, (Small company exempted accounts)(Over Farm, Over, Gloucester, GL2 8DB) http://www.overfarm.co.uk/
84. Portway Farmshop: Farmshop selling meat either home or locally reared as well as a selection of local preserves, fruit and vegetables and dairy products (Upton St Leonards, GL4 8DP Gloucester, Gloucestershire)
85. Burley fields lake: Farmshop, Fishing Lake, Christmas tree and firework supplier, and event and hog roast hire. (Burley Fields Lake, Leckhampton lane, Leckhampton, Cheltenham, GL51 4XT) http://www.burleyfieldslake.co.uk
86. Primrose Vale: Farmshop and pick your own supplying locally produced produce. (Primrose Vale Farm Shop, Shurdington Road,Bentham, Cheltenham,, Gloucestershire, GL51 4UA.) https://primrosevale.com
87. Green Gourmet: Proprietor of the Source Foods, Tribal Cravings and Choice for life brands, and supplier of a large range of quality assured produce to the food service sector (Education, Travel and Care Homes) Green Gourmet has 38 staff (no turnover figure is available but dividend payments were in excess of £250,000 in 2017) (The Moorings, Bonds Mill, Stonehouse, Gloucestershire, GL10 3RF) https://www.greengourmet.co.uk
88. Stroud Farmer's Market: Farmer's Markets in Stow, Stroud, Swindon and Gloucester. (MADE IN STROUD LTD, FRESH-N-LOCAL, UNIT 6, DANIELS IND. EST, BATH ROAD, STROUD, GL5 3TJ) https://fresh-n-local.co.uk/trader/stroud/

89. Vinotopia: Wine Merchant, (Baytree Court, The Chipping, Tetbury GL8 8EU) https://www.vinotopiawine.co.uk/
90. Cotswold Game and Meat Co: Game Dealer and Butcher, (The Old Post Office, Adlestrop, Moreton in Marsh, Gloucestershire, GL56 0UN) http://cotswoldgameandmeatco.co.uk
91. Midcounties Cooperative: Cooperative based in Warwick, though with 45 stores within a 10-mile radius of Gloucester and over a hundred stores across the Cotswold and Gloucestershire areas. Mid Counties has over 600,000 members and turnover of £1.48 billion of which £572 million came from food retail across 301 sites with 5,265 colleagues in 2016/17 https://www.midcounties.coop/
92. Freemans Event partners (logistics ltd): Operating at over 400 events annually across the UK and EU, Freemans are a provider of on the go food and drink services (Food and drink wholesaler) to public events and tourist attractions. Turnover of £30.3million in 2017 (Freemans Event Partners, Unit Q2, Quadrant Distribution Centre, Quadrant Way, Hardwicke, Gloucester GL2 2RN) https://freemanseventpartners.co.uk/
Tourism and Events
93. Cheltenham Racecourse: Racecourse and events centre with a turnover of £50million in 2017.
94. THYME: Hotel, Farm shop, Spa facilities, Pub, Restaurant and Tithe barn which is available for dining, celebrations and corporate events. (THYME, SOUTHROP MANOR ESTATE, GLOUCESTERSHIRE) https://www.thyme.co.uk/
95. The Ebrington Arms: Rated by the times the best village pub in the country in 2017. The pub has been run since 2007 by the Alexander family who in 2012 also purchased and renovated the Killingworth Castle in Oxfordshire as well as launching their own beer range, the Yubberton brewing co in 2017. (Ebrington, Chipping Campden, Gloucestershire, GL55 6NH) https://www.theebringtonarms.co.uk
96. Cotswold Farm Park: Tourist and educational attraction with daily events such as demonstrations and farm tours, run by Adam Henson of Countryfile fame. With specific focus on the breeding of rare and native minority breeds. (Cotswold Farm Park Limited, Guiting Power, Cheltenham, Gloucestershire, GL54 5FL) https://www.cotswoldfarmpark.co.uk
97. Hidcote Gardens (National Trust): National trust owned (since 1948) and run historic garden with educational events and workshops, garden centre, shop and cafe. Visited by 175,000 people per year. https://www.nationaltrust.org.uk/hidcote (Hidcote manor garden, Hidcote Bartrim, Chipping Campden, GL55 6LR)

98. Highgrove Royal Gardens (Highgrove Estate), Highgrove House, Doughton, Tetbury GL8 8TN: Part of HRH the Prince of Wale's private estate, the royal gardens are open to the public for much of the year for tours during the spring, summer and autumn, as well as more specialist events including craft workshops, the gardens also feature a shop and restaurant. https://www.highgrovegardens.com/
99. FlyUp 417 Bike Park: The 417 bike park is the largest privately owned mountain bike facility in England set across a 100 acre former farm with 13 staff. (FlyUp 417 Bike Park, Crickley Hill, Witcombe GL3 4UF) https://417bikepark.co.uk
100. Tetbury Woolsack Race: An annual event held on the last bank holiday Monday of may each year attracting 5,000 spectators, wherein contestants run a uphill relay course while carrying a woolsack. Tetbury, Gloucestershire. http://tetburywoolsack.co.uk/
Rural Economy
101. Smiths (Gloucester) ltd: Specialists in construction and waste management (Inc, asbestos removal) as well as operating a 100 strong truck fleet for logistics (Including servicing the agri-food and rural industries with waste management, construction and logistics support). Turnover of £48.6million in 2017 and c.460 staff (Alkerton Court, Eastington, Stonehouse, Gloucestershire, GL10 3AQ) https://www.smiths-gloucester.co.uk/

Appendix 2 - Forest of Dean top 30 companies

Business	Location	Business category
Albany Engineering	Lydney	Manufacturiing
BASF Metals Recycling	Cinderford	Recycling centre
Bee Green NRG	Vantage Point	Renewable energy
Bell Contracting Ltd	Cinderford	Property management
Bestpoke Brewing Company	The Mews, Mitcheldean	Traditional brewery and bespoke label design
Bladeroom	Vantage Point	Modular data centres
Ceva Logistics	Vantage Point	Logistics contract services for Xerox
Dezac Group	Cinderford	Producer and distributer
Exploration Logistics Group PLC	Vantage Point	Internet information services
Forest of Dean Fasteners	The Mews, Mitcheldean	Supplier and distributer fasteners and fixing
Forterra Formpave	Coleford	Concrete product supplier
Frontier Medex	Vantage Point	Health and safety consultants
GE Aviation/Dowty Propellers	Vantage Point	Aviation
Glatfelter UK	Lydney	Speciality papers and engineered products
Glevum	Newham	Windows, doors and conservatories
JD Norman Lydney	Lydney	Engineering/formed, machined and cast metals
JM Grail engineering	Cinderford	Engineering
Lucozade Ribena Suntory	Coleford	Lucozade and Ribena soft drink manufacture
Maybey Bridge	Lydney	Steel fabricated bridging
MF Freeman	Ruaradean	Housing developments, retirement, leisure, contracting etc.

Severn & Wye Smokery	Westbury-on-Severn	Fish and seafood smokery and restaurant
Simplicity Business	Vantage Point	Finance/payroll services
SPP Pumps	Coleford	Hydraulic equipment supplier
Stock Sweepers	Vantage Point	Road sweepers
Teledyne Deophysical Ltd.	Vantage Point	Geophysical instruments
The Warranty Group	Vantage Point	Insurance/administration & undertaking
Watts of Lydney	Lydney	Commercial vehicle dealer manufacturing and property
Wye Technology UK Ltd	The Mews, Mitcheldean	Electronics manufacturer
Xerox/ Xerox IM Europe Services	Vantage Point	Scanning document services