1 - Employment: creating 24,000 jobs in agriculture by 2040.

- When WineGB completed its first trade survey at the start of 2018, it then began to consider how the industry might grow over the coming decades. Employment in 2017 was just over 2,000 FTEs.

- As a reference point, it researched how other New World wine regions had expanded and grown. Using Oregon as a benchmark, production in the UK would equate to 40m bottles by 2040 with 45,000 acres under vine.

- Assessing the current employment numbers across a number of New World wine regions, then WineGB estimates that UK would have 24,000 FTEs by 2040.

- Making an assumption that perhaps 95% of the growth will be in the South East, then based on current plantings, an estimate can be extrapolated across those counties.

- Before the current crisis emerged, WineGB estimated that these figures would be reached well before 2040, perhaps as early as 2030. Therefore, given the current crisis, and potential recovery time, 2040 would seem logical.

- **Government Involvement**: most of these workers will probably live close to the vineyards, and the need for housing, plus health and education provisions for themselves and families in these rural settings is an essential component to enable this growth.

2 - Seasonal Labour: an essential component in the industry’s long-term growth.

- The UK industry is heavily reliant on non-UK labour for various vineyards operations throughout the year that require specialist skills, absent in the domestic market.

- Traditionally these teams have been supplied through specialist contractors who can provide highly efficient Romanians to complete this task.

- WineGB estimates that there are approx. 1,000 workers in the UK who meet these criteria and have settled status.

- Around 10-15% of this workforce leave the market every year: need to be replaced by workers with the same skill sets.

- With the acreage of vines growing at a significant rate – doubling in the last 5 years – then the need for these seasonal workers is essential to provide the industry with specialist labour over the short- to medium-term.

- **Government Involvement**: it is critical that this specific need is addressed as soon as possible to ensure this supply of labour continues.

3 - Education: broaden the geographical availability of relevant courses to increase productivity.

- Currently, there is only one college – Plumpton in West Sussex – that provides winemaking and viticulture courses. The college has a raft of options from City & Guilds Level 3 to a Masters Degree and an apprenticeship programme.

- Given the accelerated growth the industry is experiencing, then launching new faculties within existing agricultural colleges across the South-East would be essential. The employees listed in the table will need ongoing training.

- There are a number of colleges that could probably provide similar packages to Plumpton, and would provide an easier access point for many counties where vineyards are expanding.

- **Government Involvement**: seed-funding to help establish these faculties in other agricultural colleges. This might be possible with funding from DfE, and matched by County Councils and LEPs.

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For clarification, or additional detail, on any of the above points, please contact David Parkinson - david@winegb.co.uk