

Lincolnshire UK

Agrifood Investment Opportunity



**UK
FOOD
VALLEY**

Lincolnshire
COUNTY COUNCIL
Working for a better future.



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The Agrifood Sector Investment Opportunity

Lincolnshire is at the heart of the UK's £254 billion¹ agrifood sector, presenting unique investment opportunities for businesses seeking to profit from the industry's transformation and growth.

Accounting for 25% of grade 1 arable land and 11% of England's food production,² the area is home to leading industry clusters right across the food value chain – from agriculture to food manufacturing, advanced agricultural and food technologies, and logistics.

Lincolnshire is characterised by a unique nexus of businesses and research centres working to address the agrifood industry's key challenges: improving productivity, sustainability and supply chain resilience through innovation and investment in both core agrifood sector specialisations and leading-edge 'Food Industry 4.0' technologies. This knowledge and expertise is complemented by a large, specialised and cost-competitive agrifood industry workforce, supported by education providers working closely with businesses to deliver the specific skills they need.

Lincolnshire's outstanding agrifood industry ecosystem is further enhanced by incentivised, value-added Food Enterprise Zone and Freeport sites and property solutions, while the area's north-south central UK location, multimodal connectivity and agrifood logistics expertise enables fast, efficient access to UK and global markets.

All of which explains why leading agrifood sector businesses including Bakkavor, Moy Park, 2 Sisters, Young's Seafood (Sofina Foods), Princes, and Jones Food Company have chosen to locate and expand in Lincolnshire UK.

Source: (1) gov.uk: Total consumer expenditure on food, drink and catering in 2022
(2) UK Gov't, 2020.





A major, growing food market opportunity in the UK



UK-leading industry clusters across the entire food chain



A unique nexus of advanced agrifood and Industry 4.0 research and technologies



A large, specialist agrifood workforce and sector-focused skills providers



Value-added Food Enterprise Zone and Freeport sites and property solutions



Fast UK and global market access via major ports and logistics hubs



Dedicated support for your business investment project

The UK Agrifood Market Opportunity

The UK presents a major, growing market opportunity for agrifood sector businesses.



The country's 67.7 million consumers¹ spend £254 billion annually on food and drink, and increased their expenditure by 37% in the decade to 2019. The market shows strong growth in added-value premium and niche products including vegan, organic, more nutritious and 'free-from' foods.²

At present, the UK produces 61% of the food it consumes, while the EU supplies 79% of imported food and drink.³ However, Covid-19, reduced integration with EU supply chains (due to Brexit) and plans to deliver net zero carbon food chains are likely to drive the sector's transformation, through shorter, more resilient supply chains and expanded domestic production and storage.

The UK's food industry, in common with the sector globally, is finding it harder to secure the workforce it needs. Since 2015, it has therefore become a strategic priority to invest in automation, robotics and new skills to increase productivity. This has led to the creation of Europe's largest team of agricultural and food sector robotics experts, supported by industry and government, to develop world-leading, long-term solutions to labour supply constraints. The industrial application of these technologies presents significant growth opportunities for investing businesses.

Source: (1) UN, 2023 (2) gov.uk, 2022 (3) House of Lords, 2019 (latest report as of April 2024).

UK Consumers

67.7
million

UK Market Value

£254
billion
p.a.

UK Market Growth

+37%
(2010-2019)



Lincolnshire

Data is for the United Kingdom. Northern Ireland is not shown on the map.

UK-Leading Agrifood Industry Clusters

Lincolnshire is home to UK-leading industry clusters across the entire food value chain, from production to advanced food manufacturing, and in key related sectors including agricultural technology and food logistics.

These established strengths mean that businesses can access the expertise, skilled workforce, supply chains and supporting infrastructure required to reduce investment project costs, risks and timeframes, and to support ongoing growth and innovation. Significant agrifood industry clusters are situated throughout Lincolnshire, with high levels of specialisation in every local area.

Significant Agrifood & Related Industry Clusters in Lincolnshire (GB Average = 1.0)

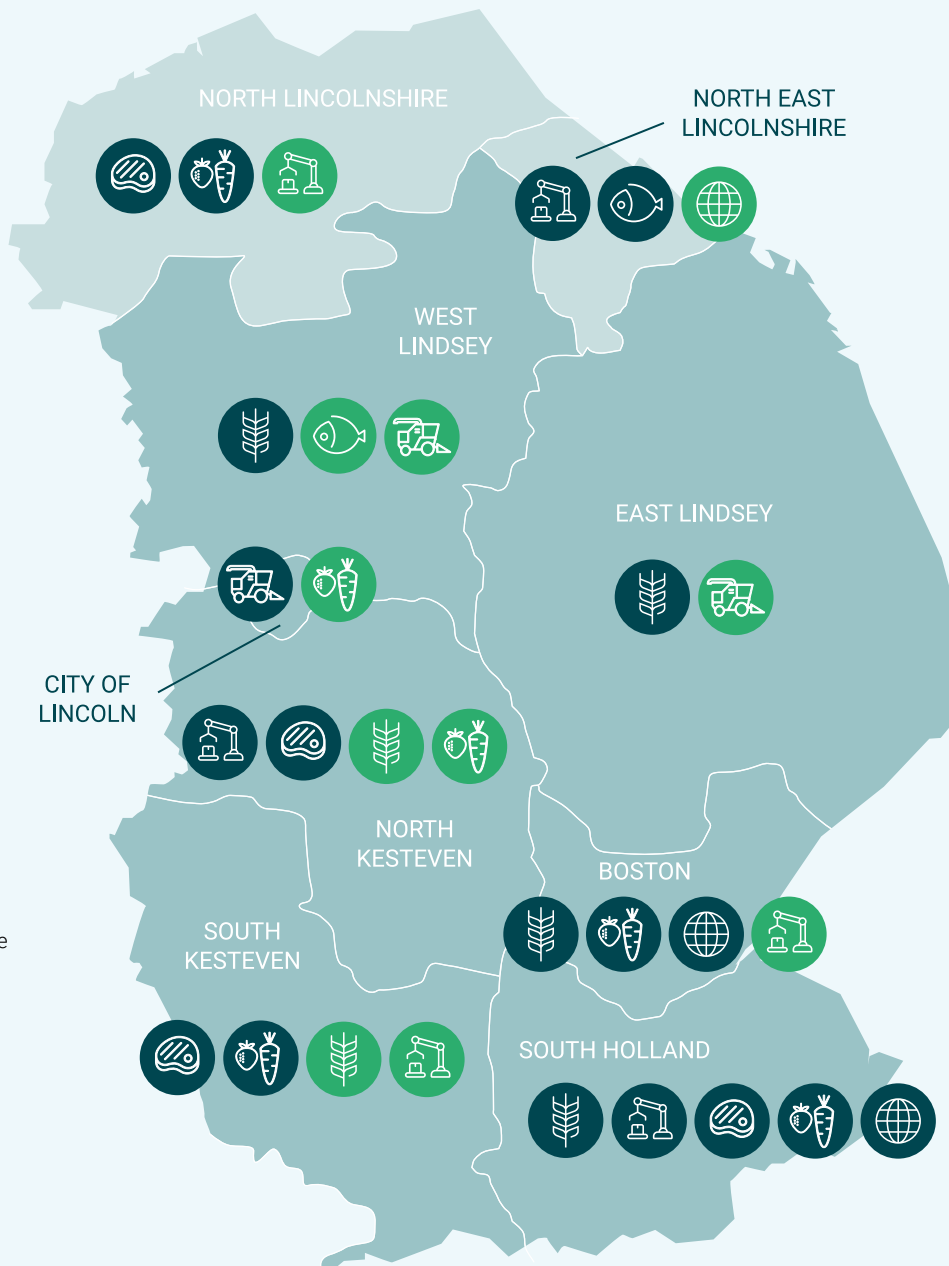
| Area | Food Production ¹ | Food Manufacturing ² | Meat Production & Processing ³ | Seafood Processing ⁴ | Fruit & Vegetables Processing ⁵ | Manufacturing (all sectors) ⁶ | Machinery & Equipment Manufacturing ⁷ | Logistics & Distribution ⁹ |
|--------------------|------------------------------|---------------------------------|---|---------------------------------|--|--|--|---------------------------------------|
| Lincolnshire | 3.5 | 4.1 | 5.8 | 16.9 | 10.5 | 1.9 | 1.5 | |
| Boston | 12.5 | 6.2 | 1.2 | 2.1 | 37.8 | 1.7 | 1.2 | |
| East Lindsey | 5.2 | | | | | 1.3 | 3.2 ⁸ | |
| Lincoln | | | | | 2.5 | | 4.6 | |
| North East Lincs. | | 6.0 | | 100.5 | | 2.2 | | 1.8 |
| North Kesteven | 3.9 | 6.7 | 28.0 | | 3.5 | 1.9 | 2.1 | |
| North Lincolnshire | 1.5 | 3.8 | 10.5 | | 8.0 | 3.4 | | 1.6 |
| South Holland | 8.2 | 12.1 | 9.8 | | 37.2 | 2.4 | | 1.0 |
| South Kesteven | 2.1 | 3.0 | 5.1 | | 24.2 | 1.3 | | |
| West Lindsey | 7.1 | 1.4 | | 7.9 | | 1.7 | 2.8 | |

Location Quotients (LQs) are an established industry clustering metric, measuring the ratio of local industry sector workforce numbers to the GB average (represented by 1.0).

LQs (Industry Clustering)

- Very High
- High
- Above GB Avg.
- Below GB Avg.

Source: ONS BRES 2022. (1) SIC01 (2) SIC10 (3) SIC101 (4) SIC102 (5) SIC103 (6) SIC C (7) SIC28 (8) SIC 30 (Transport Equipment Manufacturing) (9) SIC52 (10) Spalding, South Holland, and Boston are major food distribution hubs, although companies are recorded under other classifications (notably food manufacturing or processing).



North Lincolnshire and North East Lincolnshire are unitary authorities. All other areas are districts of the county of Lincolnshire.

| | | | | | |
|--|-----------------------------------|--|------------------------------|--|-------------------------------------|
| | VERY HIGH INDUSTRY CONCENTRATIONS | | FOOD MANUFACTURING | | FRUIT & VEGETABLES PROCESSING |
| | HIGH INDUSTRY CONCENTRATIONS | | MEAT PRODUCTION & PROCESSING | | MACHINERY & EQUIPMENT MANUFACTURING |
| | FOOD PRODUCTION | | SEAFOOD PROCESSING | | LOGISTICS & DISTRIBUTION |

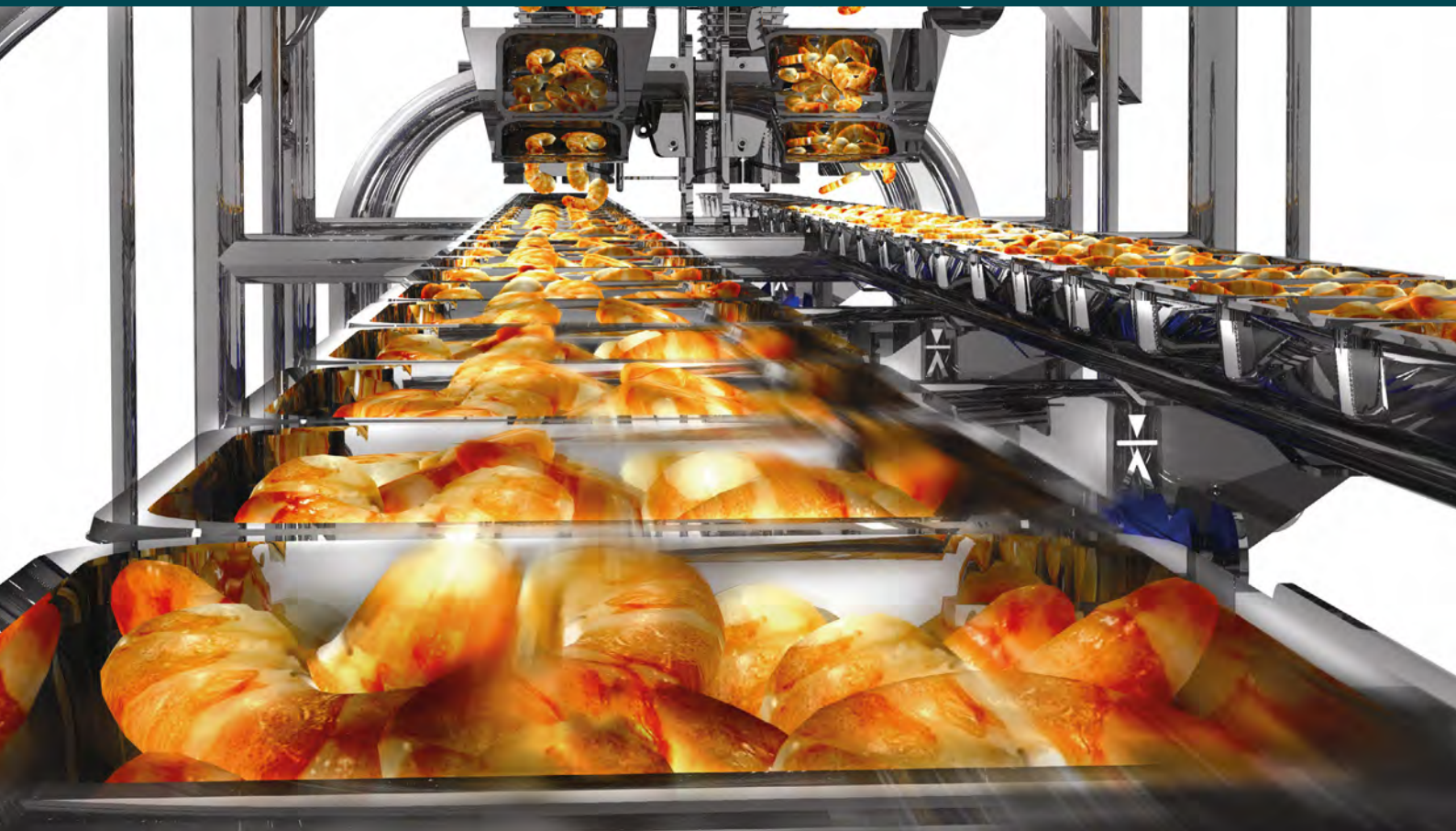
World-Class Agrifood Industry Businesses

The scale and strength of Lincolnshire's agrifood sector is reflected in its business base, which includes major food producers and processors, leading-edge technology companies, niche product innovators and specialist service providers.

Core competencies include agritech, food manufacturing technologies, value-added products and supply chain innovation, with businesses providing solutions to key industry challenges including improving productivity, sustainability, nutrition, traceability and food system security. Specific areas of excellence include:

- High-productivity agricultural and food processing technologies, including robotics and automation, and advanced cool chain and cooking technologies
- Innovative, more healthy, nutritious and environmentally aware products
- Supply chain solutions including traceability technologies and more sustainable packaging and logistics

For investing businesses, the breadth of Lincolnshire's food sector capabilities ensures a deep pool of expertise and a wide range of experienced potential supply chain partners.





Bakkavor

Fresh prepared food manufacturing



Fesa UK

Integrated food production, processing and distribution



Princes

International food & drink manufacturing group



2 Sisters

International food manufacturing group



Moy Park

Food processing; meat & vegetarian products



Young's Seafood

UK's largest seafood processor, investing in new products



Worldwide Fruit

Major fruit importer and packer, investing in new technology



Bridge Farm Group

Agricultural production; flowers & plants



Westfalia Fruit

Multinational fresh fruit supplier



Genius Foods

Gluten-free foods



Omni-Pac Group (UK)

Sustainable food packaging



ProAmpac

Sustainable food packaging



Grimme

Agricultural technology & machinery



Garford (Zürn Harvesting)

Global pioneer of robotic farm machinery



Jones Food Co.

Agri-tech – high-productivity vertical farming



Thorvald

Agri-tech – food production robotics & automation

Advanced Agrifood Industry Research & Technologies

The University of Lincoln delivers advanced, multi-disciplinary research and innovation across the entire food chain, providing cutting-edge solutions to improve the sector's productivity, sustainability, safety and resilience, while enabling new product development.

Central to the university's research offer is a unique nexus of advanced engineering, digital tech and agrifood sector competencies. Dedicated research centres apply Industry 4.0 themes and technologies including AI, Big Data analytics, Robotics & Automation and Internet of Things to key agrifood sector challenges, supporting more than 90 industry-linked innovation projects since 2016. These emerging technology capabilities are complemented by established strengths in core food sector specialisations including safety, microbiology and food processing. R&D centres of excellence in the wider cluster include Seafish¹ and the Food Refrigeration and Process Engineering Research Centre (FRPERC).²

Lincolnshire's R&D capabilities are closely aligned with the area's business strengths, creating an advanced agrifood ecosystem with the potential to deliver competitive edge for investing businesses.

(1) seafish.org (2) grimsby.ac.uk/about/frperc.



Lincoln Institute for Agri-Food Technology (LIAT)

AI, Robotics, Engineering, Crop Science, Environmental Sustainability; for food manufacturing, product development & supply chains.



World's first Agricultural Robotics Global Centre of Excellence. (Integrates LIAT & L-CAS research).

Lincoln Centre for Autonomous Systems (L-CAS)

Robotics & Autonomous Systems, mobile robots & robotic manipulators, food production & manufacturing applications.



Multi-disciplinary R&D into food supply chain digitalisation, using Artificial Intelligence, Data Analytics & emerging technologies.



UNIVERSITY OF
LINCOLN

lincoln.ac.uk

National Centre for Food Manufacturing (NCFM)

Robotics & Automation, Food Safety & Microbiology, advanced food processing technologies, food supply chain development.

SMART GREEN Research Project

Big Data analysis of climate & production data to improve energy efficiency & sustainability of greenhouse food production.

Marketing & Supply Chain Research Group

Research into food value chains (suppliers, customers & consumers) to build social & resource sustainability.

Refrigeration Research Centre

Applying Internet of Things (IoT) technologies to reduce energy use and carbon emissions from food refrigeration.

Agrifood Sector Workforce, Education & Skills

Lincolnshire provides access to a large, skilled and cost-competitive agrifood and related sector workforce that is outstanding in the UK.

Food Production: Reflecting Lincolnshire's status as Great Britain's leading county for arable farming,¹ the area is home to 16,000 agricultural workers² – more than 3 X the Great Britain average as a percentage of the total workforce.

Food Manufacturing: Lincolnshire's food manufacturing workforce is a clear leader in Great Britain. With 24,000 workers, it is significantly larger than those in England's other major food production areas, and more than 3 X the Great Britain average as a percentage of the total workforce.³

Local Area Specialisations: Lincolnshire's local areas all offer highly developed agrifood and related sector labour forces that are significantly larger than the Great Britain average (as % of total). Outstanding localised workforce strengths include meat production & processing, fruit & vegetable processing, seafood processing and machinery and equipment manufacturing.³

For businesses investing in Lincolnshire, the area's established, skilled agrifood sector workforce enables recruitment, fast project delivery and productivity.

Sources: (1) ceh.ac.uk, 2021 (2) DEFRA (3) ONS BRES 2022. Workforce numbers exclude agency and seasonal workers.



Lincolnshire's educational institutions are focused on meeting the specialised skills requirements of the area's agrifood sector businesses.

Higher Education

The University of Lincoln delivers courses and qualifications in specialisations including agricultural science, food science and technology, and logistics. The university's unique combination of agrifood, advanced engineering and digital tech capabilities is reflected in courses integrating Industry 4.0 and agrifood sector technology themes, including Agri-Robotics.



lincoln.ac.uk

Further & Higher Education Colleges

Lincolnshire's colleges work in partnerships with businesses to deliver courses, qualifications and apprenticeships tailored to their needs, from Level 1 through to post-graduate studies. Food and related subjects including agriculture, horticulture, engineering and logistics.



riseholme.ac.uk



grantham.ac.uk



lincolncollege.ac.uk



boston.ac.uk



lincoln.ac.uk



bishopburton.ac.uk

UK-Leading Agrifood Sector Education and Skills

Lincolnshire is leading the UK in developing the skills needed to transform the agrifood sector, through the application of new technologies and increased productivity. Multi-million pound investments have recently been made in new centres that combine state-of-the-art facilities, technology-focused education, and industry-led research and innovation.



lincoln.ac.uk

National Centre for Food Manufacturing (NCFM)

NCFM is the UK's largest provider of training and skills to the food processing industry, offering a wide range of courses and qualifications from day courses through to apprenticeships, degrees and PhDs. Combining education with advanced research and innovation, the Centre's new, £7 million Centre of Excellence is located at South Lincolnshire Food Enterprise Zone, in Holbeach.

Bishop Burton College Showground Campus

Completed in 2016, the £26 million campus offers industry-standard agrifood facilities including food science laboratories, commercial kitchens and engineering workshops for more than 500 full-time FE and HE students. Recent investments have focused on delivering the skills required for precision farming and providing accommodation for land-based education.



bishopburton.ac.uk

Lincolnshire Institute of Technology (IoT)

Led by the University of Lincoln with seven Higher and Further Education partners, the Institute of Technology is dedicated to developing food chain and related technical skills in agritech, food manufacturing, energy, digital and engineering disciplines. Through an investment of £15 million, the IoT is leading the transformation of Lincolnshire's skills base.



lincoln.ac.uk

Lincolnshire

Food Production Sector Workforce



Agricultural Workers¹



vs. GB Average (% of Total Workforce)²

Food Manufacturing Sector Workforce³



Workers



vs. GB Average (% of Total Workforce)

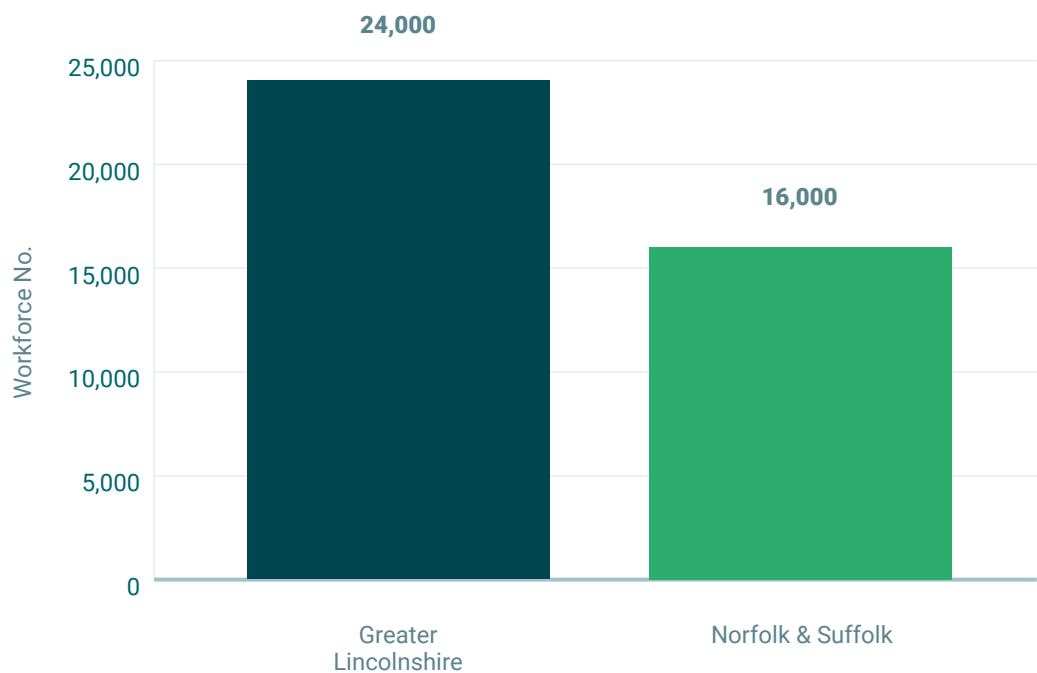
Labour Costs (Average)⁴



vs. GB Average

Food Manufacturing Sector Workforce: Regional Comparison

Comparison of Major Food Production Areas in Eastern England^{3,5}



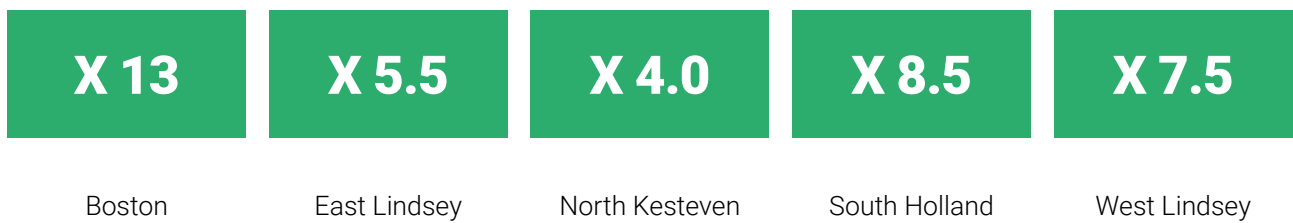
Sources: (1) DEFRA; (2-9, except 4) ONS BRES 2022: (2) SIC01 (3) SIC10 (4) ONS ASHE 2023, Gross Avg. Weekly Pay (5) Comparison of leading LEP areas for arable farming (6) SIC101 (7) SIC 102 (8) SIC 103 (9) SIC 28

Lincolnshire Areas

Workforce in Agrifood & Related Sectors vs. Great Britain Average (% of Total Workforce)



Food Production²



Food Manufacturing³



Specialised AgriFood Sector Sites & Properties

Food Enterprise Zones (FEZs)

Lincolnshire's three FEZs offer specialised, collaborative environments and flexible, cost-effective property solutions, enabling agriFood industry participants to exchange knowledge, boost productivity and grow.

Occupants including researchers, start-ups, producers, manufacturers, distributors and retailers can benefit from premium accommodation, accelerated planning, investment incentives, and excellent transport and data connectivity.



Europarc III FEZ

Europarc is an established, 110 acre FEZ with outline planning consent for a further 47 acres. Focused on the seafood and value-added food processing sectors, the site offers diverse property options including serviced business space, business units, design and build, and serviced development plots, with high-quality conference and meeting facilities in the Innovation Centre. Key site occupants include Seafish, Hain Daniels, Morrisons, 2 Sisters and ProAmpac.¹

South Lincolnshire FEZ

Located in Holbeach, south Lincolnshire, at the heart of the UK Food Valley, South Lincolnshire FEZ offers bespoke, high-quality business space for companies in the agri-tech and food manufacturing sectors. Site and property solutions include serviced development plots, purpose-built offices and R&D workshops, alongside partners of the University of Lincoln's National Centre for Food Manufacturing.²



southlincolnshirefez.co.uk

Central Lincolnshire FEZ

Central Lincolnshire FEZ is a 30 hectare site with an approved Local Development Order and plans for up to 70,000 sq m of new commercial property development. Focused on growing the area's agrifood cluster, the site provides office, industrial and warehousing accommodation specifically for sector or related organisations. Leading food supply chain businesses established in the area include Woldgrain Storage, ParkAcre and Plastipak Packaging.^{3,4}





Lincolnshire offers a range of high-quality, cost-effective sites and property solutions for investing agrifood sector businesses, including:

- Prime properties for research, manufacturing and distribution activities
- Specialised Food Enterprise Zones (FEZs) with investment incentives
- Sites with Freeport tax incentives for investing businesses
- Collaborative environments with shared meeting and conferencing facilities
- Direct access to leading agrifood sector research centres
- Fast access to key UK markets, distribution hubs, ports and airport



Property Cost Savings



vs. Peterborough



vs. Leicester



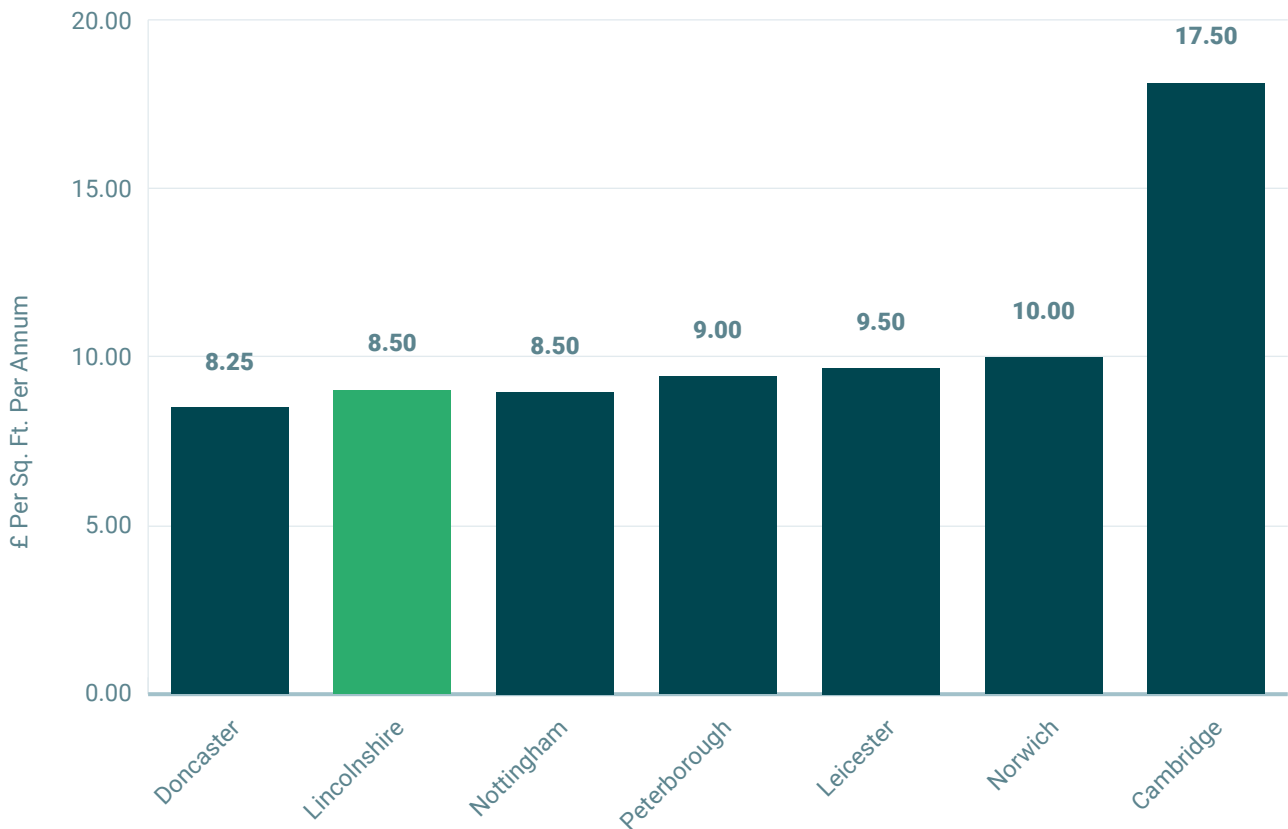
vs. Norwich



vs. Cambridge

Industrial Property Rents: £ Per Sq. Ft. Per Annum

Comparison of Key UK Food Production & Manufacturing Locations¹



Sources: (1) Carter Jonas & regional property agents, Q3 2023-Q1 2024.

Specialised Food Logistics

Lincolnshire is home to a major food logistics cluster supporting the area's agriculture and food manufacturing industries.



Key capabilities include:

A highly developed logistics cluster

- Specialisations include ports services, cold chain storage and distribution, freight forwarding, shipping, and warehousing automation technologies.

Extensive ports infrastructure and services

- Grimsby and Immingham (the UK's largest port by tonnage) offer specialised food logistics services, on-port warehousing (30,000 sq m), and frequent Ro-Ro and Container (Lo-Lo) services to European and global markets.
- The Port of Boston offers proximity to Spalding's food logistics hub, warehousing (18,000 sq m), co-operative grain silos (50,000 tonnes) feeder services to Rotterdam and Amsterdam, and ambitious 'food port' growth plans.

Advanced cold chain capabilities

- Large-scale temperature-controlled storage is available at logistics hubs including Grimsby (230,000 tonnes capacity on-port or adjacent), Spalding (29 Americold temperature-controlled stores) and Humberside Airport (200 sq m).

Consented sites for food logistics

- Premium sites consented for food logistics activities include three Food Enterprise Zones (FEZs) and St Modwen Park (Lincoln).
- Sites with Freeport tax incentives for investing businesses

Logistics sector skills and education

- Lincolnshire offers an available, specialised logistics workforce supported by sector-focused education in the area's colleges and universities.

- A highly developed food logistics cluster** (Icon: Network diagram)
- Consented sites for food logistics** (Icon: Industrial buildings)
- Extensive ports infrastructure and services** (Icon: Ship)
- Logistics sector skills and education** (Icon: Person silhouette)
- Advanced cold chain capabilities** (Icon: Snowflake)
- Advanced warehousing automation technologies** (Icon: Warehouse with automation)



ABP

Operators: ports of Grimsby & Immingham

DFDS

Cold chain shipping, storage & distribution

Brakes Brothers

Specialist food services & distribution

FreshLinc

Specialised food logistics



XPO Logistics

Temperature-controlled logistics & distribution

Americold

Advanced temperature-controlled storage

Cartwright Brothers

Temperature-controlled logistics & distribution

Orderwise

Advanced warehousing robotics & automation

Fast UK & Global Market Access

As well as leading the UK in food production, manufacturing and technologies, Lincolnshire provides agrifood sector businesses with fast, multimodal access to distribution hubs and consumer markets in the UK and worldwide.





By Road

Lincolnshire's central Great Britain location (north-south) means that key Midlands distribution hubs (on the M1 and A1 corridors) are accessible within 1 1/2 hours' HGV drive time.¹

More than 75% of the UK's population can be reached within 4 hours' HGV drive time – less than one driver shift.



By Sea

The South Humber ports (Immingham and Grimsby) are among the UK's largest by tonnage,² offering deep water facilities, frequent lo-lo (container) and ro-ro services to European ports, deep-sea feeder services for global market access, and extensive food warehousing and cold-storage facilities.³

The Port of Boston serves UK destinations for containers and bulk foods, and offers extensive port-side warehousing and grain silos.⁴



By Air

Airports accessible within 2 hours' drive time⁵ include East Midlands (EMA), the UK's no.2 air cargo hub⁶, Birmingham and Leeds-Bradford (LBA).

Within the area, Humberside Airport (HUY) offers frequent 'hub-feeder' services to Amsterdam Schiphol (AMS) and onward connections to 800 global destinations with KLM and SkyTeam partners. The airport's Perishables Hub offers chilled food storage facilities.⁷



By Rail

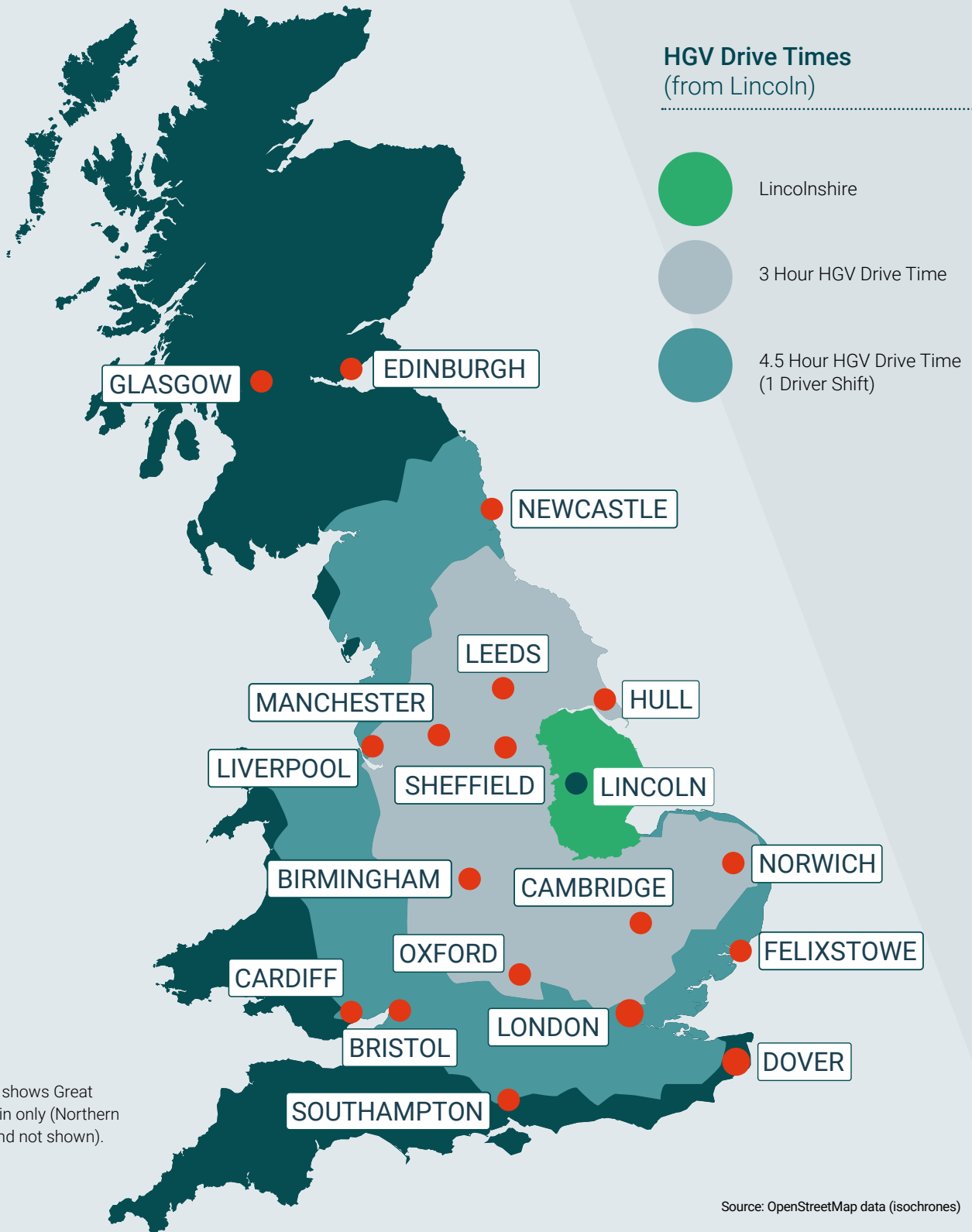
The ports of Immingham, Grimsby and Boston are all freight rail connected, with W12-gauge access ('high cube' containers) at Immingham and Grimsby.³ For business travellers, Lincolnshire also offers fast connectivity to UK destinations including London, which is accessible from Lincoln in less than 2 hours.⁸

Rail system upgrades are currently in progress to further improve passenger and freight capacity and service speeds.

Lincolnshire's Location & Connectivity



UK Market Access



Support for Your Agrifood Sector Business Investment

**Contact us to find out
how we can support your
business relocation or
expansion project.**

Support for Investors from the Lincolnshire Partnership

Working together, Invest Lincolnshire and our partner organisations, including local authorities, education providers and businesses, provide dedicated support to ensure a 'soft landing' for companies investing in Lincolnshire.

Our services to business include:

- Support in finding the right site or property
- Planning application support and guidance
- Location, economic and market intelligence
- Access to workforce recruitment, education and training solutions
- Access to sector specialists
- Access to sector-specific support programmes
- Access to local supply chains and business networks
- Access to funding for business investment

Contact Us

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served by One Team

