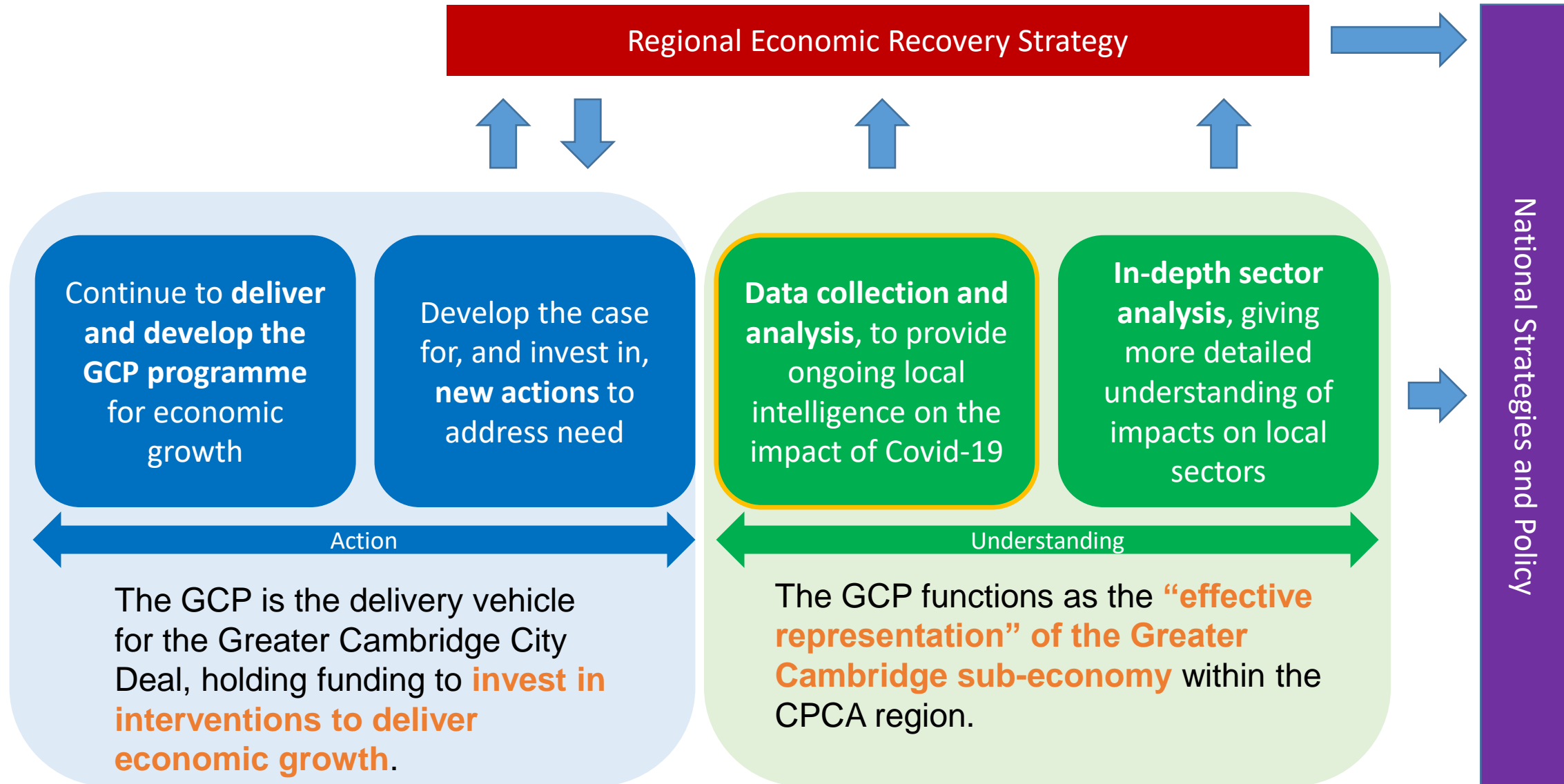





# Role of the GCP

## GCP-led local approach to recovery



# RAG Dashboard

-  Impact on, and risks to, the Greater Cambridge economy have increased since the last report.
-  Impact on, and risks to, the Greater Cambridge economy have remained the same/are stable.
-  Impact on, or risks to, the Greater Cambridge economy are decreasing.


## Overview:


- General signs are that consumers are gradually out and spending more, although consumer confidence remains very low;
- Labour market indicators show increases to claimant count and take-up of Government support, which is winding down shortly.

## Public Health

- Local confirmed cases continue to increase, broadly in line with national trends;
- National lockdown measures implemented in response to the national public health situation pose significant economic risks over the next month.

Change since last month:


Economic Impact 


Economic Risks 

## Consumer Behaviour

- Continued gradual increase in footfall, although remains well below previous year;
- Consumer confidence dropped in September;
- Recovery in retail spend accelerated in September; spending level based on pre-lockdown now ahead of other major cities.

Change since last month:


Economic Impact 


Economic Risks 

## Labour Market

- Claimant count stable throughout September, with increasing count being observed for younger people;
- Relatively low take-up of JRS/SEISS, particularly in the current 'second wave' applications;
- Continuing recovery in vacancies;
- Major risks posed by second lockdown (although somewhat alleviated by extension to JRS).

Change since last month:

Economic Impact 

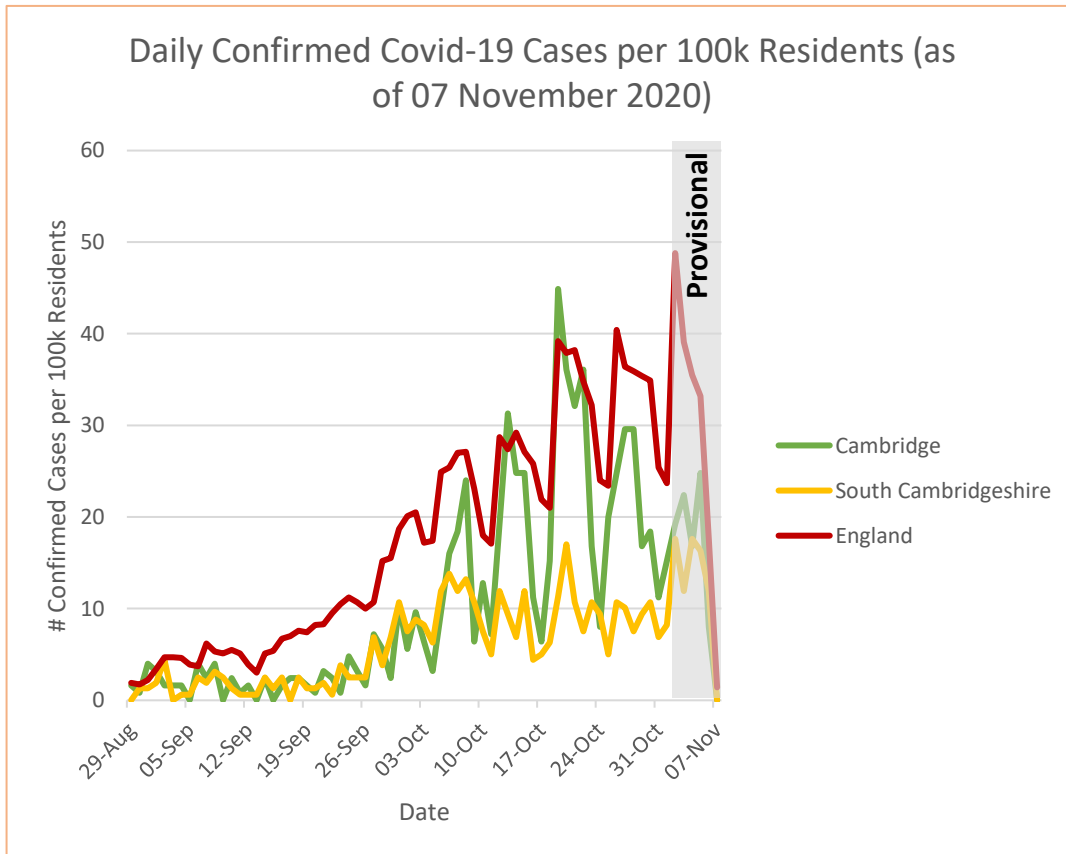
Economic Risks 

# Public Health

*Briefly highlighting the current local trends in Covid-19 cases and deaths, with a view to understanding the potential for a local lockdown, or other impacts on residents that may affect economic behaviour.*

## Overview:

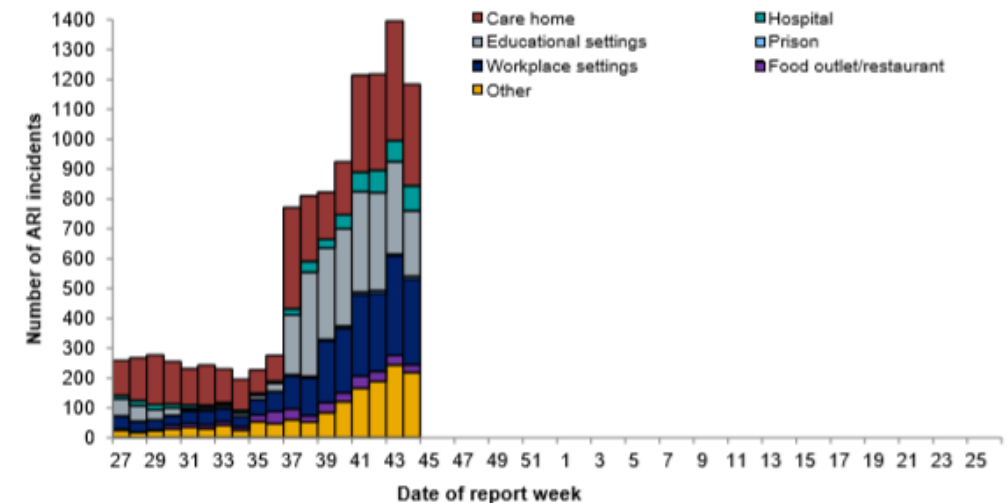
- Confirmed cases spiked locally in mid-October, driven by cases in Cambridge, but are now back below and trending with the national average.
- National lockdown started on 5<sup>th</sup> November and is currently due to run until 2<sup>nd</sup> December, with restrictions on many businesses, due to the national public health picture.



## National PHE data on incidents of confirmed or suspected outbreaks of Covid-19

PHE produce a weekly “National Influenza and Covid-19 report”, including data on suspected or confirmed outbreaks of acute respiratory infections (i.e. Covid-19) nationally.

1184 new incidents were reported in the UK in the week of [week 44]. The majority (53%) of these reports were from care homes or workplace settings.

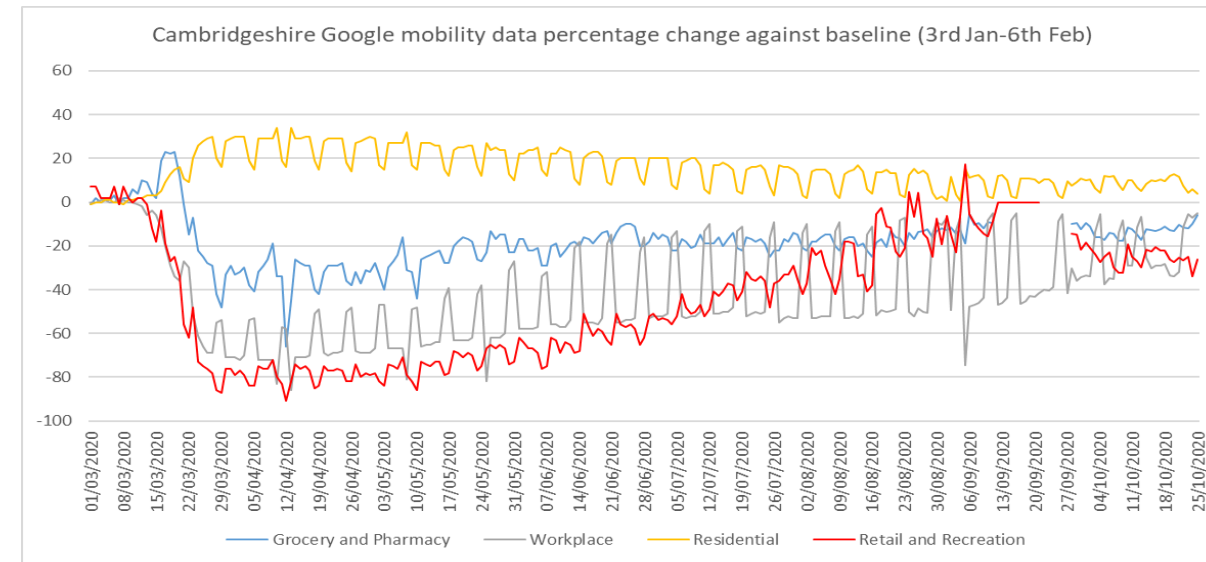
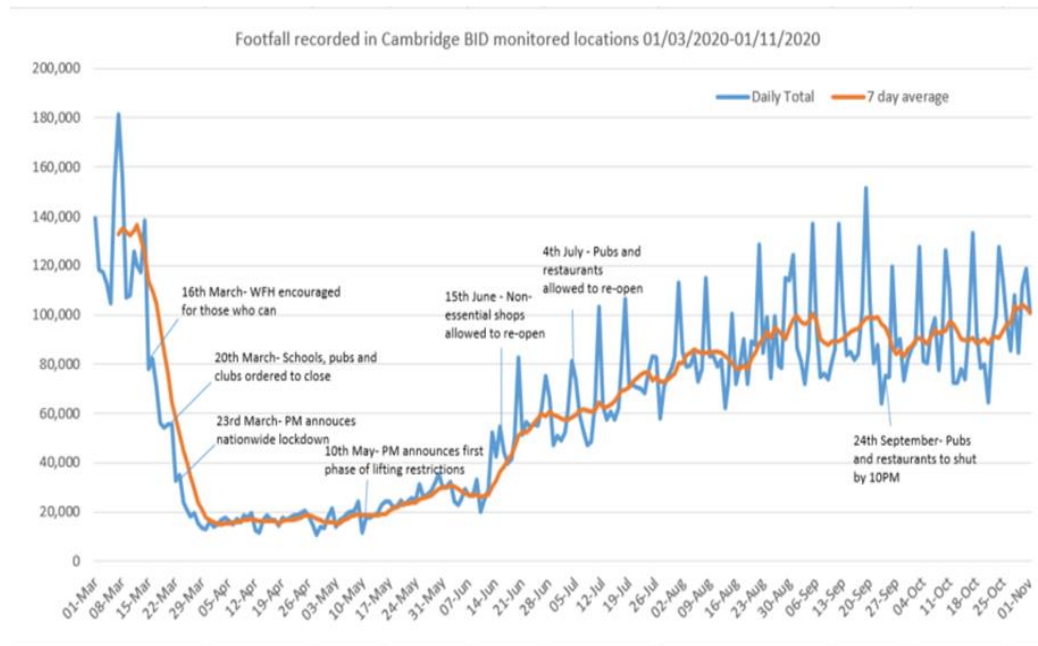


# Consumer Behaviour – Footfall

*With a focus on footfall, understanding emerging indications of consumer behaviour, including of spending and confidence.*

## Overview:

- Cambridge BID data for the city centre indicates that retail footfall continued to recover into October, but remains well down on 2019;
- Google Mobility data show that most movement remains below an early 2020 baseline and is largely stable across most categories;



## Cambridge footfall data:

- Retail footfall up 5% in October compared to September – seeing gradual increases since the rapid increase in late summer;
- Retail footfall down around 35% year-on-year throughout October;
- Increase in footfall from September most pronounced between 6 and 10pm – indicating some impact of the 10pm closing time for pubs and restaurants implemented in late September.

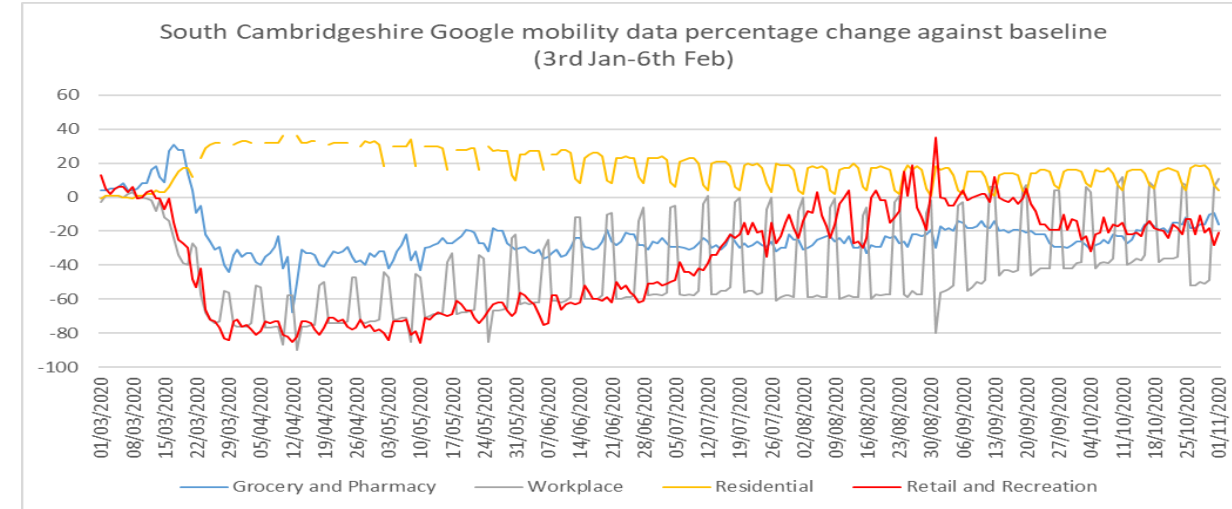
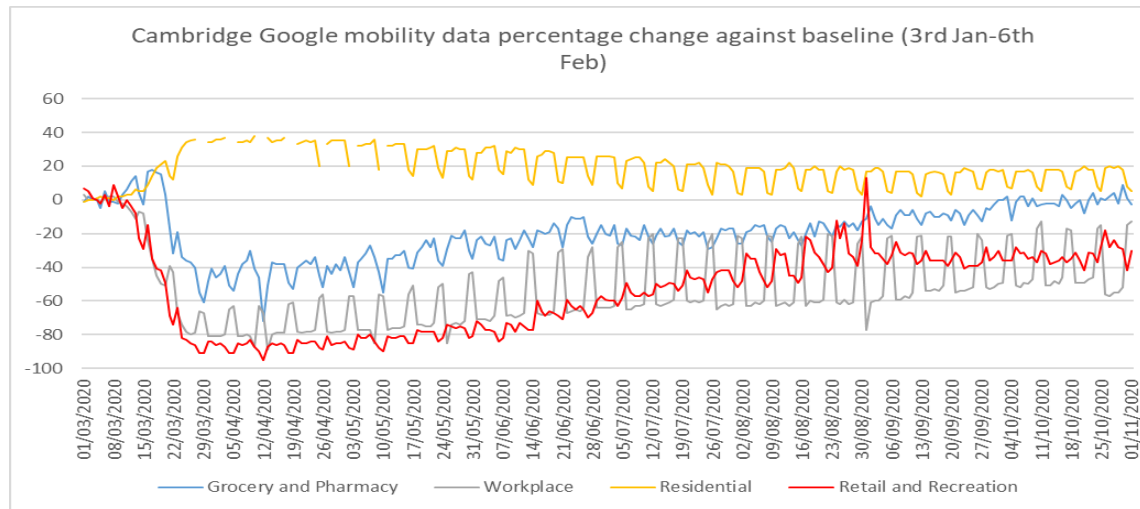
## Google Mobility data (based on Jan/Feb baseline):

- Data for Cambridgeshire – requested data for Cambridge and South Cambridgeshire specifically.
- Workplace and Grocery and Pharmacy visits remain below the baseline – with a slight week-on-week (to October 25<sup>th</sup>) fall for Grocery and Pharmacy, and slight rise for Workplace.
- Retail and Recreation visits remain significantly below the baseline and have been falling in weeks up to October 25<sup>th</sup>.

# Consumer Behaviour – Google Mobility Data

## Overview:

- Data gathered from Google account holders location history. The comparison of social mobility change is based on the most recent several weeks up to the report date (2<sup>nd</sup> November) compared to the median of the corresponding day in the baseline period (3<sup>rd</sup> Jan-6<sup>th</sup> Feb)



### Cambridge Mobility data (based on Jan/Feb baseline):

- Grocery visits were 3% closer to the baseline in the 7 days to 2nd November compared to the 7 days prior and are now 2% above the baseline.
- Workplace visits were 4% further from the baseline in the last 7 days compared to the 7 days prior and are now 43% below the baseline.
- Residential visits were 1% further from the baseline in the last 7 days and are now 16% above the baseline.
- Retail and recreation visits were 5% closer to the baseline in the 7 days to 2nd November compared to the 7 days prior and are now 28% lower than the baseline.

### South Cambridgeshire Mobility data (based on Jan/Feb baseline):

- Grocery visits were 2% closer to the baseline in the 7 days to 2<sup>nd</sup> November compared to the 7 days prior and are now 15% below the baseline
- Workplace visits were 10% further from the baseline in the last 7 days compared to the 7 days prior and are now 34% below the baseline.**
- Residential visits were 1% further from the baseline in the last 7 days compared to the 7 days prior and are now 14% above the baseline.**
- Retail and recreation visits remained the same in the 7 days to 2<sup>nd</sup> November compared to the 7 days prior and are now 19% lower than the baseline.**

# Consumer Behaviour – Consumer Confidence and Activity

## Overview:

- The impact of the November lockdown will be of major interest for the next report;
- GfK's measure of consumer confidence shows a drop in confidence into October;
- Retail sales are increasing in line with pre-pandemic trends, driven in part by strong online retail sales.

Consumer confidence index  
GfK Overall Index Score



## GfK Consumer Confidence Survey

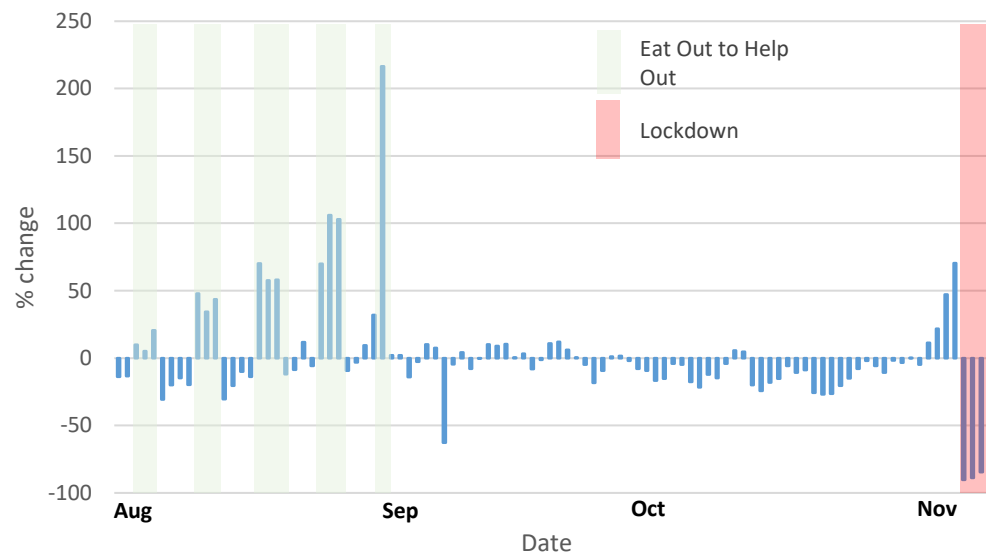
GfK's Consumer Confidence Index (carried out on behalf of the European Commission) measures a range of consumer attitudes, including forward expectations of the general economic situation and households' financial positions, and views on making major household purchases.

The index was -31 in October, falling back by six points from -25 in September.

## Key findings from GfK:

- Impact of November lockdown will be of much interest;
- Consumers **less positive** based on all elements of the index, including particularly individual perceptions of the "General Economic Situation over next 12 months".

% change in seated diners (year-on-year, OpenTable UK data)



OpenTable data (left) shows seated diner levels in UK restaurants dropped below 2019 levels in October, after largely stabilising in September following Eat Out to Help Out.

National lockdown restrictions mean no seated diners will be permitted throughout November.

## ONS Retail Sales Headlines (September 2020)

- Volume of retail sales up 1.5% compared with August 2020, up 5.5% compared with February 2020;
- Value of retail sales up 1.4% compared with August 2020, up 3.9% compared with February 2020;
- Non-food stores up 1.7% on February 2020 but mixed prospects across sectors: clothing and department stores remain down, but household goods stores have recovered strongly.
- Online sales continue to decline month-on-month (down 1.2% on August) but proportion of online sales across all retail remains higher than in February (27.5%, compared to 20.1%).

# Consumer Behaviour – Recovery and Spend 1

The **Centre for Cities**, in partnership with **Nationwide Building Society**, have created a data dashboard to track city centre recovery.

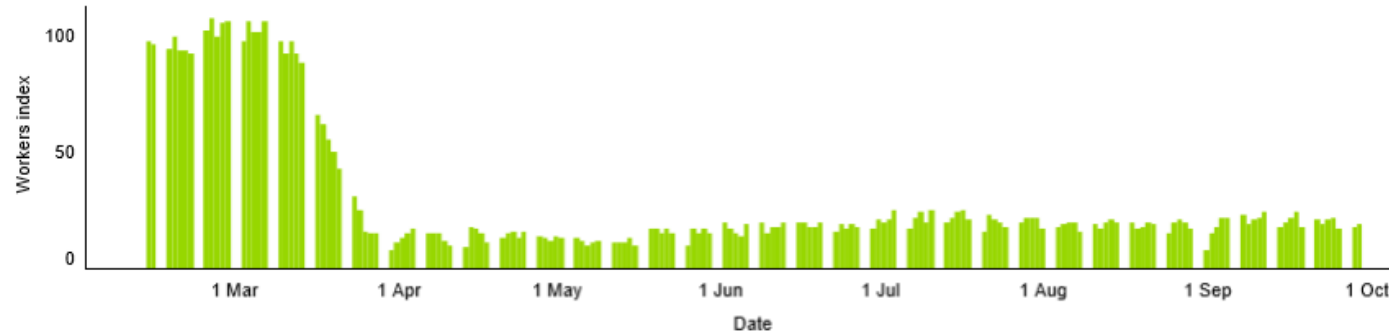
In particular, the insights generated on **spend** and **weekday workers** in the city centre give extra insights, above and beyond other measures.

## Overview:

- Data shows that the number of workers in the city centre on weekdays remains well down on pre-lockdown levels;
- The number of people in the city centre on weekends has recovered more strongly, although remained below pre-lockdown by the end of September..

### Workers index

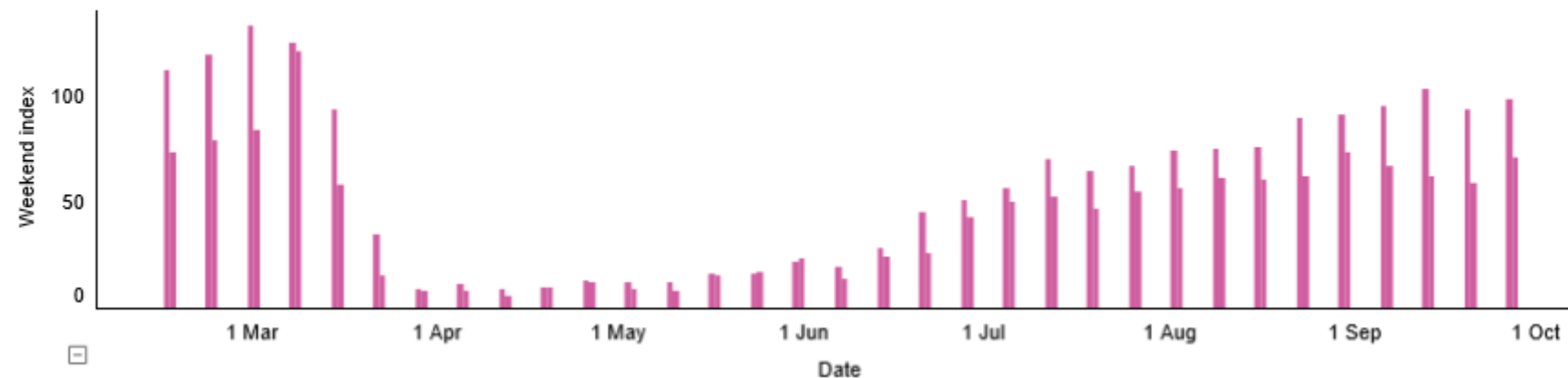
This index looks at city-centre workers in the city centre in the daytime on weekdays, compared to a pre-lockdown baseline of 100.



The data shows that the number of **workers** in the city centre in the daytime on weekdays remains well below pre-lockdown, running at around 20% of pre-lockdown levels since June 2020.

### Weekend index

This index looks at people who were in the city centre, in the daytime at weekends, compared to a pre-lockdown baseline of 100.



The data shows that the number of **people** in the city centre in the daytime on weekends has recovered far more strongly than for weekday workers – running at around 85% of the pre-lockdown baseline by the end of September.

# Consumer Behaviour – Recovery and Spend 2

The **Centre for Cities**, in partnership with **Nationwide Building Society**, have created a data dashboard to track city centre recovery.

In particular, the insights generated on **spend** and **weekday workers** in the city centre give extra insights, above and beyond other measures.

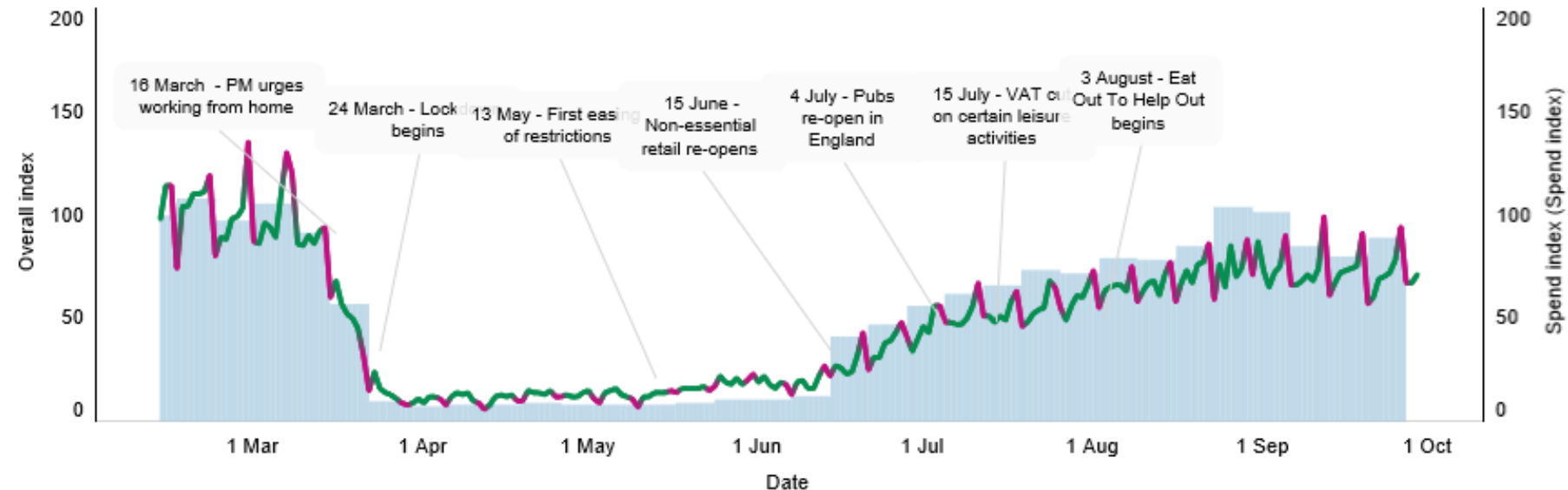
## Overview:

- Data indicates that city centre spending recovered moderately strongly to the end of September – outperforming cities including London, Oxford, Manchester and Edinburgh.

### Overall recovery and spend index

This index looks at everyone who was in the city centre at any time of the day, compared to a pre-lockdown baseline of 100.

The spend index looks at relevant offline sales made in the city centre at any time of the day, compared to a pre-lockdown baseline of 100.



**Overall index: 73**

**Spend index: 89**

**Spend** (represented by the blue bar on the chart above) remains below the pre-lockdown baseline (89); this is moderately strong, with the spend in Cambridge closer to the baseline than in London, Oxford, Manchester and Edinburgh (to name a few).

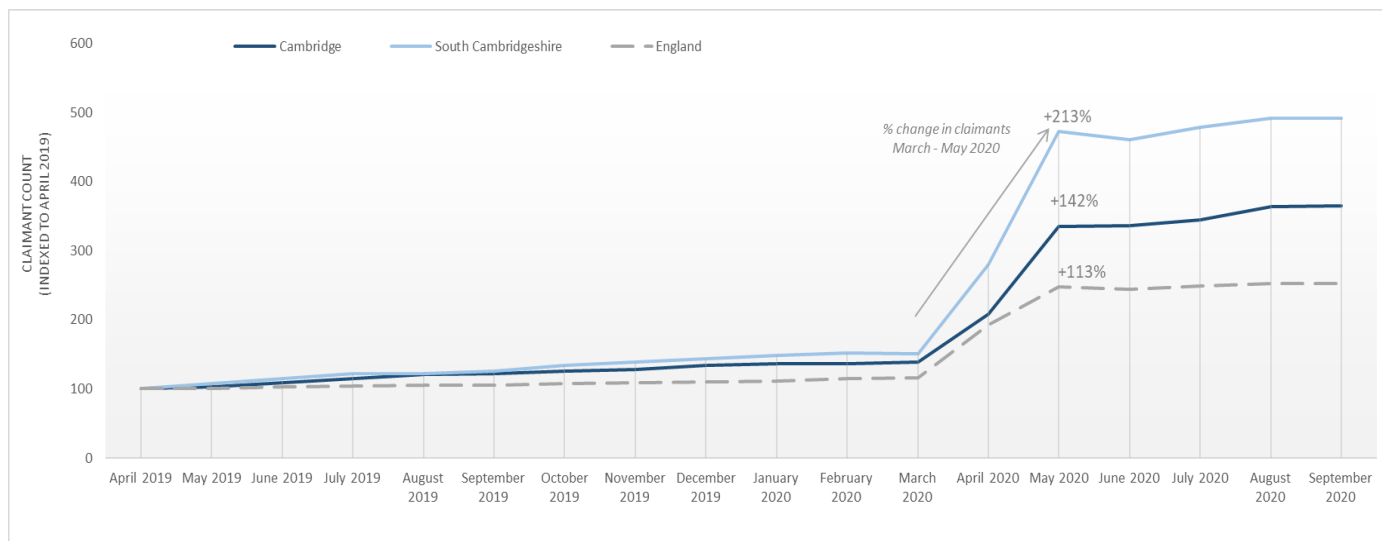


# Labour Market – Claimant Count

## Overview:

- Claimant count increased dramatically from March to May 2020, although this has since started to stabilise with little or no change across Greater Cambridge from August to September 2020.
- In total, 7,125 people or 4% of people aged 16+ in Greater Cambridge are currently claiming. In South Cambridgeshire, a much higher proportion (6.9%) of 18-24 year olds are currently claiming, compared the whole population 16+ (3.5%)

Claimant Count data across Greater Cambridge, to 30<sup>th</sup> September 2020



September Claimant Rate, by selected age groups

(Note: percentages are presented as a proportion of all (or subset of the) working age population 16-64, where applicable; numbers in brackets include all residents 16+ (i.e. include those over the age of 64))

	Cambridge		South Cambs		ENG
<b>Age</b>	<b>Claimant Rate (arrow indicates monthly change)</b>				
16+	4.3% (3,755)	↑	3.5% (3,370)	↔	6.6%
16-17	0.6% (15)	↑	0.1% (5)	↔	0.3%
18-24	2.9% (730)	↑	6.9% (650)	↑	9.4%
25-49	5.5% (2,225)	↓	3.7% (1,860)	↓	7.2%
50+	2.3% (790)	↔	1.4% (860)	↑	2.5%

\*figures may not add up due to rounding

- **7,125 claimants\*** across the GCP area; **3.9% of people aged 16+**, compared to 6.6% across England;
- **226% increase in South Cambs**, March-September 2020 – largest increase; but still the lowest proportion of residents aged 16-64 claiming (3.5%) compared to the rest of the county.
- September 2020 shows **very similar claimant data to August**, with only +10 more claimants in Cambridge and no change in South Cambridgeshire (although there were varying trends by age group). Cambridgeshire overall saw an increase of 30+ claimant from August.

\*this figure includes all residents over the age of 16 (not just working age)

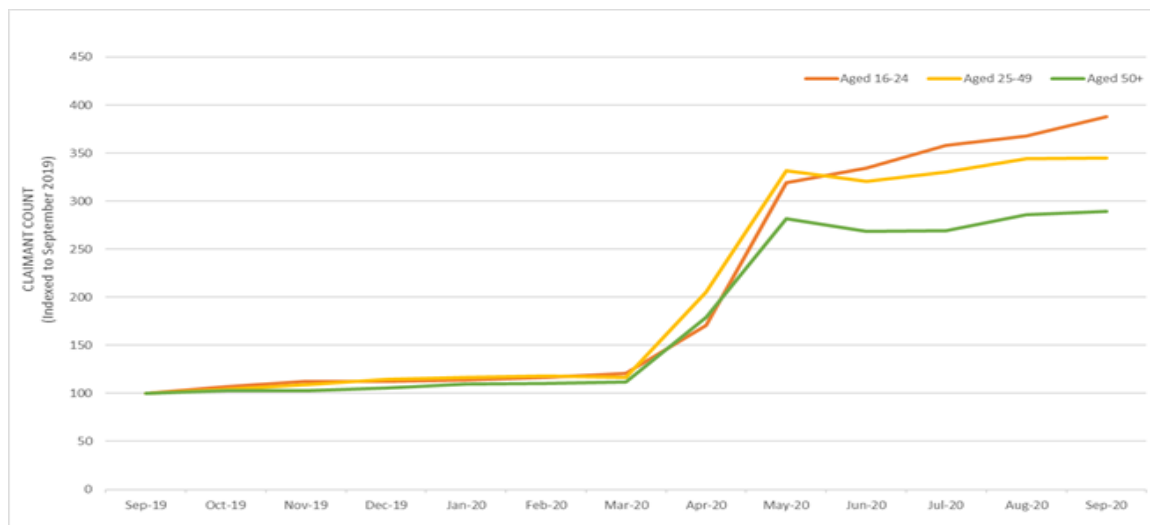
	September 2020	Compared to March 2020 (number/%)	Proportion of residents 16-64 claiming (September 2020)
Cambridge City	3,755	+2,330 (+164%)	4%
South Cambridgeshire	3,370	+2,335 (+226%)	4%
Cambridgeshire	17,525	+11,020 (+169%)	4%

# Labour Market – Claimant Count by Age and Location

## Overview:

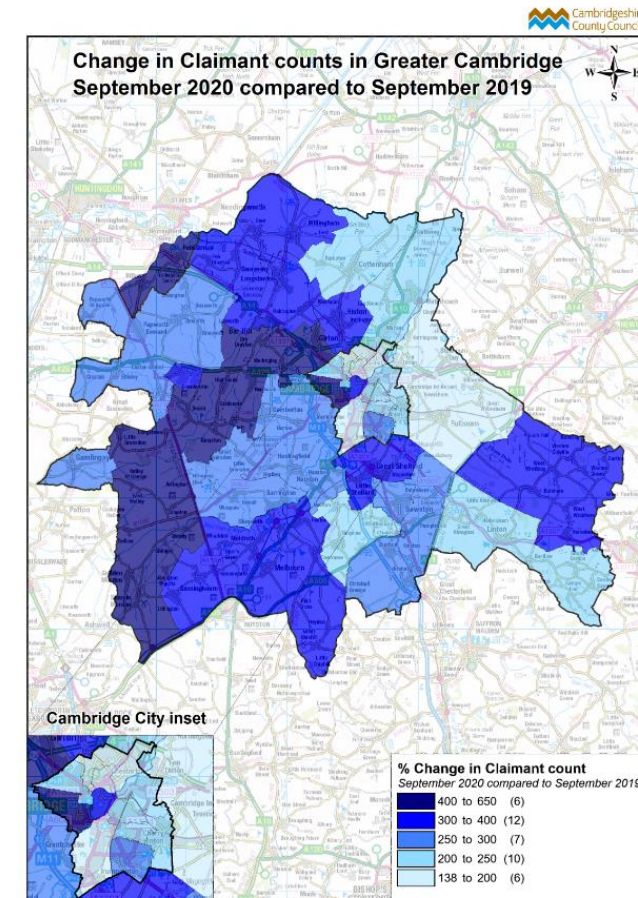
- Over the period May to September 2020 there has been a noticeable widening in claimant counts by age groups, with 16-24 year olds increasing at a faster rate than other age groups.
- Whilst the overall GCP rate see around 4% of people claiming, Kings Hedges has a much higher rate of 9% of the 16-64 population claiming.
- The **wards with the highest claimant rates in September 2020 are all in Cambridge City**, with **Kings Hedges having the highest claimant rate (9%)** across Greater Cambridge.
- Looking at the **changes in claimant rate from September 2019** indicates that the following wards have seen the highest levels of change: **The Mordens (+650%), Girton (+467%), Newnham and Hardwick (both +450%)**.
- The areas with the highest levels of claimants have seen relatively low levels of change** (all less than +247%) in comparison to the wards listed above - this indicates the higher base for claimants in these areas.

September Claimant Counts by Age Group (Indexed to 2019)



Wards with highest claimant rate in Greater Cambridge (as a proportion of 16-64 population)

Ward	Claimant Rate - September
Kings Hedges	9.0
Abbey	7.2
Arbury	6.7
East Chesterton	6.4
Cherry Hinton	5.5



# Labour Market – Job Retention Scheme

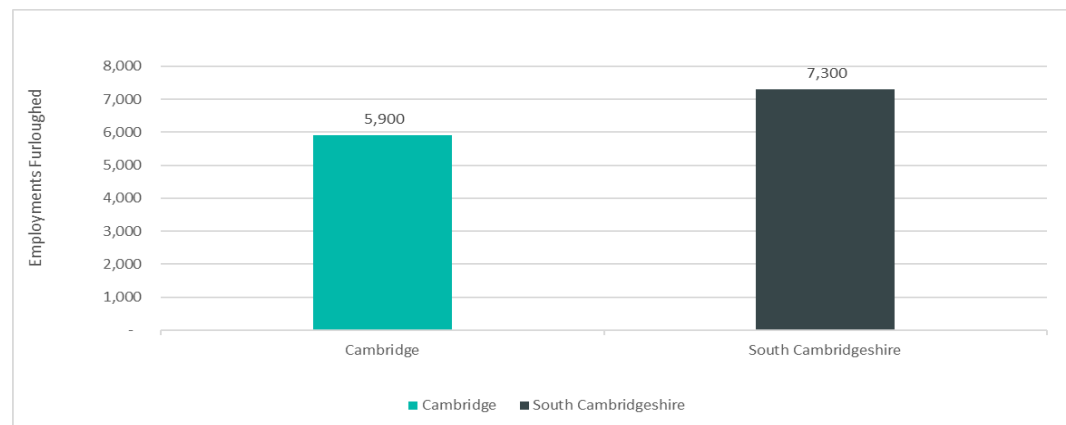
## Overview:

- 13,200 employments furloughed as at **August 31st 2020, representing 10% of employees**. The scheme is still open and therefore figures are likely to increase in the future months.
- Nationally and regionally, 90% of employees who left the Coronavirus Job Retention Scheme (CJRS) furlough scheme between April and July were still on their original payroll in August, suggesting they remained working for their original employer at this point.

The first wave of the governments coronavirus job retention scheme saw 36,600 employments across Greater Cambridge furloughed to the end of June 2020.

Since the beginning of July 2020, the second wave of the governments coronavirus job retention scheme opened. In the second wave, employers have had the flexibility to bring furloughed employees back to work part time. Additionally, employers have the flexibility to decide the hours and shift patterns of their employees – with the government continuing to pay 80% of salaries for the hours they do not work.

Number of employments furloughed under the Government's Job Retention Scheme (JRS) in Greater Cambridge, second wave up until 31<sup>st</sup> August



- In Greater Cambridge, there were **13,200 employments furloughed as at August 31<sup>st</sup> 2020\***, representing **10% of employees aged 16-64** (compared to 36,600 employments (28% of employees) furloughed in wave 1, to the end of June 2020).
- Nationally and regionally, **90% of employees who left the Coronavirus Job Retention Scheme (CJRS) furlough scheme between April and July were still on their original payroll in August**, suggesting they remained working for their original employer<sup>1</sup> at that point.

*\*The figures for July and August 2020 are based on incomplete data and should be considered to be provisional and subject to change. This is because claims for staff furloughed from the start of July onwards can be submitted until 30 November. It is estimated that the overall total number of people furloughed at the end of August will be in the region of 12% higher once all claims are submitted and revisions applied.*

<sup>1</sup>Coronavirus Job Retention Scheme statistics: secondary analysis of ended furloughs. Available: <https://www.gov.uk/government/publications/coronavirus-job-retention-scheme-statistics-secondary-analysis/coronavirus-job-retention-scheme-statistics-secondary-analysis-of-ended-furloughs>

# Labour Market – Self Employment Income Support Scheme

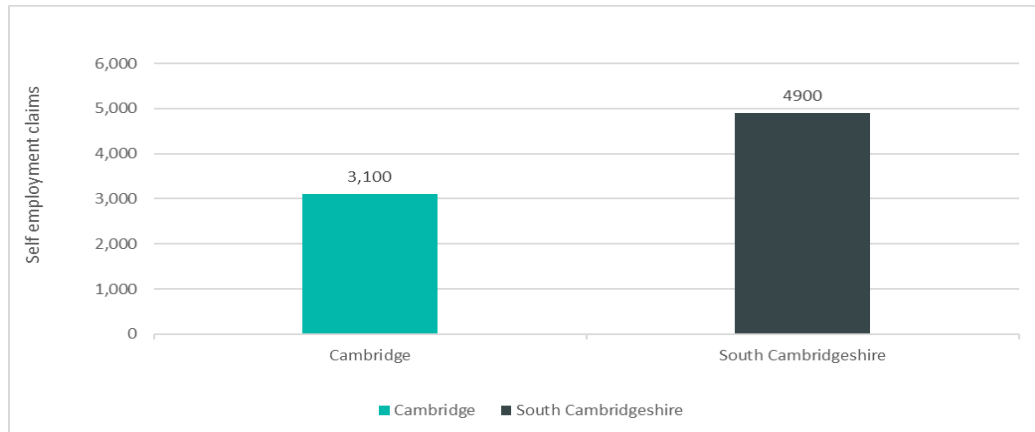
## Support Scheme

### Overview:

- 8,000 claims have been made to the Self Employment Income Support Scheme (SEISS) to the end of September, worth £21.9m in the second grant wave.
- Take-up of the SEISS has been lower in wave 2 compared to wave 1, and take up remains lower in Greater Cambridge than regional and national rates.

The first wave of the governments self employment income support scheme saw 9,400 claims made across Greater Cambridge (worth £29.6m) up to 31<sup>st</sup> July 2020.

Number of claims to the Government's Self-Employment Income Support Scheme (SEISS) in Greater Cambridge, Second grant wave up to 30<sup>th</sup> September



Location	Wave 1 SEISS Take-Up Rate (based on # eligible individuals)	Wave 2 SEISS Take-Up Rate (based on # eligible individuals)
Cambridge	70%	62%
South Cambridgeshire	72%	61%
East of England	76%	66%
UK	77%	67%

- The Wave 2 SEISS take-up rate across Greater Cambridge increased from 54% at the end of August to 62% by the end of September, in line with regional and national monthly increases.
- This is still lower than the regional take up rate of 66% and the national at 67%.

### SEISS up until 30<sup>th</sup> September (second grant wave)

- **8,000 claims** to the SEISS across Greater Cambridge to 30<sup>th</sup> September 2020 – worth **£21.9m** (claims in wave 1 were worth £29.6m over 9,400 claims).
- Cambridge has seen **lowest number of claims** (3,100), and **lowest value of claims** (£8m) across the county. **South Cambs saw more claims** (4,900), to a higher value (£13.9m).
- Average claim value in Cambridge (£2,600) is lower than South Cambs (£2,800).

# Labour Market – Unemployment

Unemployment measures people without a job who have been actively seeking work within the last four weeks and are available to start work within the next two weeks. The unemployment rate is not the proportion of the total population who are unemployed. The proportions are of the economically active population (those in work plus those seeking and available to work) who are unemployed.

## Overview:

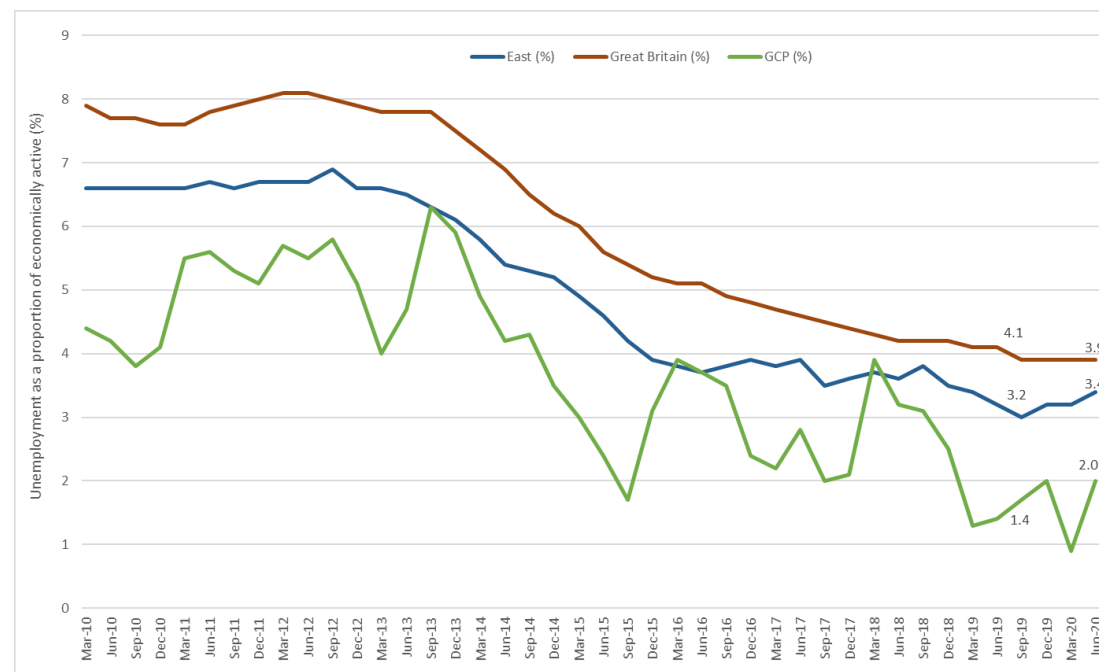
- Estimates show 4,200 people across the Greater Cambridge area were unemployed April-June 2020.
- Cambridge City has seen the largest increase in unemployment both in terms of numbers (+900 people) and rates (+28%) across the County.

The data presents the situation up to June 2020, and although this covers the period after the implementation of the coronavirus (COVID-19) social distancing measures furlough and other employment support measures were still in place during this reference period.

- Historically, unemployment rates have been falling over the past decade and in the past few years Greater Cambridge unemployment rate has been falling away from the regional and national average.
- **Estimates for April to June 2020 show 4,200 people across the Greater Cambridge area were unemployed, 700 more than a year earlier and an increase of 600 compared to the first quarter of 2020.**
- In Quarter 2 of 2020, Greater Cambridge saw a 1.1 percentage point increase from Q1 of 2020, and a 0.6 percentage point increase from Q2 2019 - **both greater increases compared to regional and national average equivalents.**
- **Cambridge City has seen the largest increase in unemployment both in terms of numbers (+900 people) and rates (+28%) across the County since Q2 in 2019.** The greatest of this increase was seen between Q1 and Q2 of 2020.
- **South Cambridgeshire had the second highest increases across the County in unemployment after Cambridge, with a 12% increase since this time last year.** This increase occurred between Q1 and Q2 of 2020.

### District Unemployment (modelled)

	Quarter 2 2020	Compared to Quarter 1 2020 (number/%)	Compared to Quarter 2 2019 (number/%)	Proportion of residents unemployed (Quarter 2 2020)
Cambridge City	2,300	+400 (+21%)	+500 (+28%)	3%
South Cambridgeshire	1,900	+200 (+12%)	+200 (+12%)	2%



Note: all district level data numbers are model-based estimates of unemployment. This is a new modelling methodology to produce modelled estimates of unemployment levels and rates for local authority districts and unitary authorities (LAD/UAs).

# Labour Market – Vacancies

Data provided through Burning Glass by the Cambridgeshire and Peterborough Combined Authority.

## Overview:

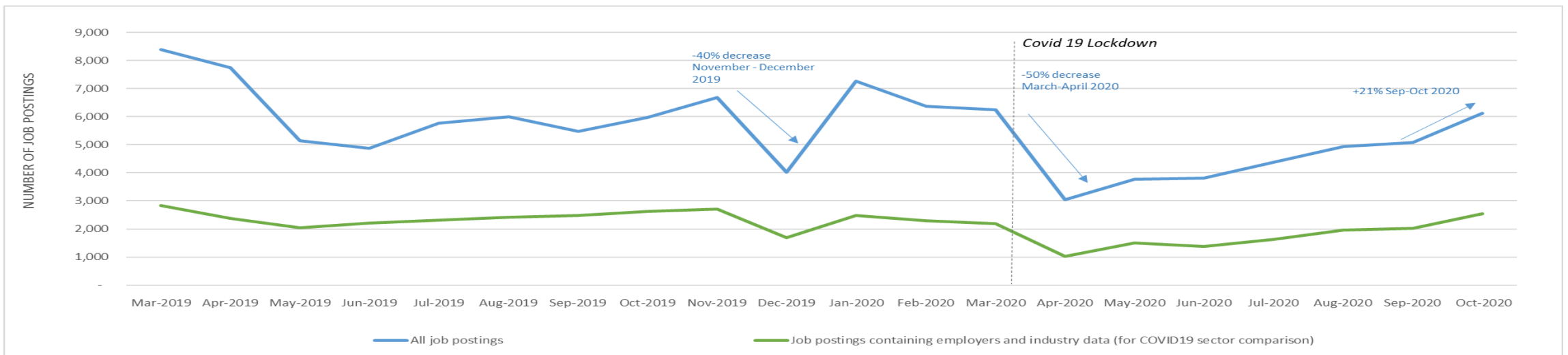
- In October 2020, total postings were 2% higher than October 2019 and for the second quarter of this monitoring year (July-September) postings were -17% lower than the same period last year.
- Job postings were down by 8% in the last three months compared to the same period last year.

- There were **6,113 postings across Greater Cambridge in October 2020, up by 21% from September.**
- **In October 2020, total postings were 2% higher than October 2019.**
- Looking at the last three months (August-October) **job postings were down by -7.7% when compared to the August to October in 2019.**

Job postings from August to October in 2020 compared to 2019

District	Aug-Oct 2019	Aug-Oct 2020	% Difference
Cambridge	16,548	15,259	-7.8
South Cambridgeshire	910	857	-5.8
Greater Cambridge	17,458	16,116	-7.7

Monthly job postings across Greater Cambridge



# Labour Market – Vacancies by Sector

Data provided through Burning Glass by the Cambridgeshire and Peterborough Combined Authority.

## Overview:

- Increased vacancies in October 2020 has resulted in some employment sectors having more vacancies than the same time last year, notably “Administrative and Support Service Activities” and “Construction”.
- All sectors except for “Financial & Insurance Activities” and “Manufacturing” have increased vacancies in the Greater Cambridge area since April 2020 – Public Administration & Defence has seen the biggest increase (+318%) (note low base).

Employment Sector	Vacancies in Greater Cambridge: October 2020	Greater Cambridge % Difference April-October 2020	National % Difference April-October 2020
HUMAN HEALTH AND SOCIAL WORK ACTIVITIES	708	▲ 26.7	▲ 40.6
EDUCATION	643	▲ 160.3	▲ 189.9
PROFESSIONAL, SCIENTIFIC AND TECHNICAL ACTIVITIES	330	▲ 39.2	▲ 148.6
MANUFACTURING	185	▼ -12.7	▲ 171.9
WHOLESALE AND RETAIL TRADE; REPAIR OF MOTOR VEHICLES AND MOTORCYCLES	171	▲ 189.8	▲ 292.6
ADMINISTRATIVE AND SUPPORT SERVICE ACTIVITIES	78	▲ 100.0	▲ 218.3
INFORMATION AND COMMUNICATION	104	▲ 103.9	▲ 99.3
ACCOMMODATION AND FOOD SERVICE ACTIVITIES	37	▲ 27.6	▲ 368.2
OTHER SERVICE ACTIVITIES	48	▲ 26.3	▲ 135.3
PUBLIC ADMINISTRATION AND DEFENCE; COMPULSORY SOCIAL SECURITY	92	▲ 318.2	▲ 185.9
FINANCIAL AND INSURANCE ACTIVITIES	31	▼ -20.5	▲ 117.5
CONSTRUCTION	45	▲ 246.2	▲ 340.6
TRANSPORTATION AND STORAGE	23	▲ 21.1	▲ 484.4
REAL ESTATE ACTIVITIES	20	▬ -4.8	▲ 168.8
ARTS, ENTERTAINMENT AND RECREATION	13	▲ 18.2	▲ 271.3
OTHER SECTORS*	13	▲ 85.7	▲ 211.2

October 2020 saw an **increase in vacancies by 21%** from September 2020, with the following sectors now having more vacancies than the same time last year<sup>1</sup>:

- Administrative and support service activities**
- Construction**
- Public Administration & Defence**
- Human Health and Social work Activities**

Nationally, all employment sectors have an increased number of vacancies when compared to April 2020, indicating a strong overall recovery. However, in Greater Cambridge, “Financial and Insurance Activities”, “Manufacturing” and “Real Estate Activities” **have not recovered in line with national rates.**

Analysis of potential redundancies in Cambridgeshire & Peterborough through data provided by the insolvency service **highlights that “Manufacturing” has had the highest redundancy rates and the second highest absolute counts, which could be linked to the slower recovery of vacancies in Greater Cambridge.**

The same applies for the **“Financial and Insurance Activities” employment sector, which has seen the third highest rates** of potential redundancies across Cambridgeshire and Peterborough.

\*OTHER SECTORS INCLUDES: MINING AND QUARRYING; WATER SUPPLY; SEWERAGE; WASTE MANAGEMENT AND REMEDIATION ACTIVITIES; ELECTRICITY, GAS, STEAM AND AIR CONDITIONING SUPPLY; ACTIVITIES OF EXTRATERRITORIAL ORGANISATIONS AND BODIES; AND AGRICULTURE, FORESTRY AND FISHING

<sup>1</sup>Full vacancies analysis looking back to this time last year provided separately

# Labour Market – Vacancies by Sector 2

Data provided through Burning Glass by the  
Cambridgeshire and Peterborough Combined Authority.

**Overview:** The below table provides a full overview of vacancies in Greater Cambridge in October 2020, how this compares to April 2020, October 2019 and a national comparison.

Employment Sector	Vacancies in Greater Cambridge: October 2020	Greater Cambridge % Difference October 2019-2020	Greater Cambridge % Difference April-October 2020	National % Difference October 2019-2020	National % Difference April-October 2020
HUMAN HEALTH AND SOCIAL WORK ACTIVITIES	708	35.6	26.7	22.0	40.6
EDUCATION	643	11.6	160.3	10.5	189.9
PROFESSIONAL, SCIENTIFIC AND TECHNICAL ACTIVITIES	330	-17.1	39.2	-2.9	148.6
MANUFACTURING	185	-38.3	-12.7	9.7	171.9
WHOLESALE AND RETAIL TRADE; REPAIR OF MOTOR VEHICLES AND MOTORCYCLES	171	-7.1	189.8	-10.7	292.6
ADMINISTRATIVE AND SUPPORT SERVICE ACTIVITIES	78	66.0	100.0	2.3	218.3
INFORMATION AND COMMUNICATION	104	-27.8	103.9	-14.2	99.3
ACCOMMODATION AND FOOD SERVICE ACTIVITIES	37	-64.1	27.6	-57.2	368.2
OTHER SERVICE ACTIVITIES	48	-66.7	26.3	-5.8	135.3
PUBLIC ADMINISTRATION AND DEFENCE; COMPULSORY SOCIAL SECURITY	92	46.0	318.2	-9.5	185.9
FINANCIAL AND INSURANCE ACTIVITIES	31	-13.9	-20.5	-10.2	117.5
CONSTRUCTION	45	60.7	246.2	18.6	340.6
TRANSPORTATION AND STORAGE	23	0.0	21.1	19.7	484.4
REAL ESTATE ACTIVITIES	20	-31.0	-4.8	4.4	168.8
ARTS, ENTERTAINMENT AND RECREATION	13	-13.3	18.2	-37.3	271.3
OTHER SECTORS*	13	-18.8	85.7	1.9	211.2

\*OTHER SECTORS INCLUDES: MINING AND QUARRYING; WATER SUPPLY; SEWERAGE; WASTE MANAGEMENT AND REMEDIATION ACTIVITIES; ELECTRICITY, GAS, STEAM AND AIR CONDITIONING SUPPLY; ACTIVITIES OF EXTRATERRITORIAL ORGANISATIONS AND BODIES; AND AGRICULTURE, FORESTRY AND FISHING