BCSEP Annex 2
Sector Profiles and Dashboards
Annex 2 - Black Country Sector Profiles

A key objective of our growth strategy is to enable growth in each of our transformational and enabling sectors. Our focus on sectors, strategic centres and growth corridors is an important feature of our approach and is particularly important in the context of the forthcoming industrial strategy with its emphasis on sectors and sectors. This section comprises a sector profile for each of our growth sectors.

**TRANSFORMATIONAL SECTORS**

- Advanced Manufacturing
- Building Technologies
- Business Services
- Environmental Technologies
- Transport Technologies

**ENABLING SECTORS**

- Health
- Public Sector
- Retail
- Sports
- Visitor Economy
Advanced Manufacturing is a key sector for the Black Country. The area is home to a world-class manufacturing and engineering base with an unprecedented history of driving innovation forward. The sector includes a number of sub sectors ranging from the manufacture of metals and machinery and chemical treatments to tooling, food and drink and the manufacture of furniture and equipment.

Key Facts - the Black Country’s Advanced Manufacturing sector:
- Contributes £3bn to the UK economy and is forecast to grow by £2.5bn by 2030.
- Employs 67,000 people and has 3,985 businesses operating in the sector.
- Has a higher proportion of GVA and jobs compared to the UK average. The sector accounts for 15.7% of the Black Country’s total GVA compared to 10.1% for the UK and 13.5% of jobs compared to 10.1% for the UK.

Industry Profile
- There are 600 high turnover businesses (£1m+) and 29 large businesses employing over 250 people. Over half of the high turnover businesses are in Metals & Metal Products. Other key sectors are Machinery, Equipment, Furniture & Recycling (24.5%) and the manufacture of Chemicals, Rubber, Plastics & Non-metallic products (10.8%).
- High profile employers include ZF Lemforder UK Limited, Hadley Industries PLC, Assa Abloy Limited, Sandvik Limited and B E Wedge Ltd. Castings Public Limited Company and Chamberlin PLC are listed on the London Stock Exchange.
- There are also a number of companies listed in the 1,000 Companies to Inspire Britain 2016 - AL Building Systems Ltd, Hill Steels Ltd, L & S Engineers Ltd and Sherwood Stainless Steel (Service Centre) Ltd.
- There is a large proportion of SMEs that make a significant contribution to this sector. SMEs operating in the Advanced Manufacturing sector in the Black Country include Chicken Joes in Aldridge, Dudley based Westfield Sports Cars and Goldring Industries in Wolverhampton.

Products & Services
- Assa Abloy, the world’s largest lock manufacturer by sales volume, has its UK headquarters in the Black Country.
- ZF Lemforder’s Darlaston factory supplies suspension control arms to Jaguar, Aston Martin and Toyota.
- 2 Sisters Food Group supplies chicken products to major supermarkets such as Sainsbury’s, Tesco, and Aldi, as well as the specialist Oakham range for Marks and Spencer.
- The Queen’s handbags are made at a Launer London factory in Walsall.
- Pargat make all of the cookware that goes to every major supermarket.
- Precision Chains make the chains for the London Underground escalators.
- Hadley Industries make Ultra Steel.
- RMD Kwikform helped install the roof of the Aquatics Centre for London 2012.
- Zaun Fencing designed, manufactured and supplied the fencing that surrounded the Olympic Park site.
- Teknor Apex manufacture supplies for the medical sector and these include moulded medical parts and components, tubing and medical cables.
- One on Solvay’s markets is healthcare - their products include speciality polymers for biocompatible medical implants and sodium bicarbonate for effervescent tablets.
- Chicken Joes is the UK’s largest manufacturer of ready marinated chicken.
- Westfield Sports Cars was the first Niche Vehicle Manufacturer to be awarded European Small Series Production
Status.

- **Goldring Industries** supply ship refuelling systems to the Royal Navy.

**Employment Profile**

- The Black Country Advanced Manufacturing sector employs 67,000 people in total. 28,000 people are employed in the manufacture of metals and fabricated metal goods. Almost 70% of employment is concentrated in 3 sub sectors - Metals and fabricated metal goods (28,000); Furniture, other manufacturing & repair and installation of machinery (11,000) and Food, beverages and tobacco products (6,000).

- The largest growth over the period 2003-2013 has been in **Architectural & Engineering activities** which has grown by 1,260 jobs (36% growth rate compared to 33% for the UK)

- Food & drink manufacturing saw an increase of 1,000 jobs from 2013 to 2014. Growth areas included processing and production of meat and poultry products and the manufacture of bread, pastries and cakes. Significant food manufacturing businesses include **Boparan Holdings Limited**, owner of 2 Sister’s Food Group and **East End Foods**, a leading supplier and innovator in the UK Indian food market.

**Centres of Excellence**

- **Dudley Advance**: Centre for Advanced Manufacturing and Engineering Technology - at a cost of £9 million, Dudley Advance offers 2,800m² of specialist teaching space spread over four floors. The building contains facilities for the study of engineering and advanced manufacturing including mechatronics, electrical engineering and engineering science, as well as traditional machine tool based engineering and CNC. A range of full-time and part-time courses and Apprenticeship training is available, all directly linked to the traditional processes and emerging technologies needed across the engineering and manufacturing sector. A partnership with Aston University is also in place to support potential graduates who require high-level skills or who are progressing into management or technical roles.

- **Engineering and Computer Science Research Centre**: based at the University of Wolverhampton, the centre undertakes research in the areas of aerospace and automotive engineering, rapid manufacturing and prototyping, material science and advanced manufacturing.

- **Midlands Simulation Group**: based at the University of Wolverhampton, the group is made up of active researchers having a common interest in numerical modelling and simulation. The aim of the Midlands Simulation Group is to facilitate high quality research and development in the area of computer simulation for engineering and related industries.

- **Caparo Innovation Centre**: the centre provides new product development services to UK businesses including technical and commercial screening reviews, intellectual property services and design and prototyping services.

- **Science, Technology and Prototyping Centre**: the new centre at the University of Wolverhampton Science Park site is under construction and will offer 4,000 square metres of specialist space to scientific-based businesses to develop and enhance their research and development activities.

- **Black Country Colleges**: Engineering & Manufacturing - offering a range of subjects including mechanical engineering, manufacturing engineering, materials processing and finishing as well as short bespoke courses in subjects such as CNC programming and operation, CAD, welding and tool making. Facilities include state of the art CAD suites with the latest industry software, CNC workshops, rapid prototyping labs and mechatronics training facilities for pneumatic and hydraulics skills development.

**Innovation**

- The West Midlands Science & Innovation Audit identifies clear growth opportunities within four market driven priorities - Next Generation Transport; Medical Technologies and Pharmaceuticals; Future Food Processing; Energy and Low Carbon. The 3 LEPs have commissioned a West Midlands Combined Authority Innovation Audit to shape the action plan for building an effective innovation ecosystem to support the long-term growth of our business base and drive productivity growth.
Opportunities

- **Industry 4.0**: this represents the next revolution in industrialisation. It is predominantly based on a host of new technologies which are digitising manufacturing. Essentially, the centralised, offline and unconnected systems of today will soon become “smart factories”, in which inter-connected machines will capture more data and convey it in more useful ways to enhance the speed and quality of decision making in manufacturing processes. Industry 4.0 technologies are seen to be transforming the manufacturing sector, with their key benefits being enhanced productivity, mass customisation, better quality control and traceability, and improved supply chain collaboration. In an EEF survey, 80% of manufacturers say Industry 4.0 will be a business reality by 2025, and PWC have previously stated that no industrial company can ignore the fundamental changes that Industry 4.0 will bring.

  Key technologies/developments under the Industry 4.0 umbrella include: Autonomous Robots; Big Data; Internet of Things; Cloud Computing; Additive Manufacturing and Simulation.

- **New Business Models**: Industry 4.0 will also be an enabler of new business models, which can drive higher value activity across the sector. Servitisation - offering services alongside products, mass customisation, and circular economy principles are all ways in which manufacturers are beginning to shift from traditional models in order to better meet modern demands.

- **National Infrastructure Investments**: in rail, energy, and building and construction will offer significant opportunities for UK manufacturing.

- **Demand for Light weighting**: governments’ push to reduce emissions and the move from combustion engines to electric vehicles powered by heavy batteries is set to propel a need for lightweight materials, including composites and lighter metals such as aluminium and titanium.

Barriers

- **Awareness and Adoption of Industry 4.0**: Despite the optimism surrounding the benefits of Industry 4.0, there is a consensus that UK manufacturers are currently lagging behind global competitors in this field. This is demonstrated most aptly in a survey of UK manufacturers by BDO which finds 56% have little or no understanding of Industry 4.0. A lack of education can mean a lack of investment and this is something which will need to be addressed to ensure UK manufacturers aren’t left behind.

- **Sector Growth Based on Low-Skilled Jobs**: UK manufacturing appears to be creating low-skilled jobs without enhancing its productive capacity.

- **Investment** is at relatively low levels in manufacturing compared with the economy as a whole. There also remains concerns about the ground to be made up on international competitors in linking research and innovation to commercial products.

- **Skills Shortage**: Manufacturing has a higher proportion of skill-shortage vacancies than average and training spend/training activity indicators are lower than the UK average.

- **Uncertainty**: This is the enemy of ambition and investment; the UK’s uncertain political and economic future is likely to continue for a lengthy period, making it harder for manufacturers plan confidently for the future.

Commissions

- The **West Midlands Productivity Commission** is based on a model for radical reform of the whole skills system that will reduce unemployment, raise skills levels and make a significant contribution to raising productivity. The Commission aims to establish the true extent of the productivity challenge in the West Midlands by looking to:
  - Understand the component causes of the productivity challenge and the inter-relationships between them
  - Make recommendations as to how these individual causes can be addressed
  - Ensure appropriate plans are developed for the implementation of these recommendations and monitoring systems exist to review their effectiveness.

- The role of the **West Midlands Land Commission** is to take a fresh look at matters affecting the West Midlands’ land supply. It will consider what measures could be initiated and undertaken to ensure an improved supply of developable land which supports the growth ambitions of business, the housing needs of residents, and the future diversification of the local economy.
**Transport Technologies** is a key strength in the Black Country. The sector includes global logistics organisations and the area is also a centre of excellence for aerospace engineering. Supporting OEMs such as Jaguar Land Rover and home to an extensive network of Tier 1 and Tier 2 suppliers, the Black Country is at the technological heart of the UK’s automotive industry. Black Country companies manufacture and test aerospace actuation systems and aerospace fluid transmission systems - specialisms include autoflight systems, control systems, electrical power systems, and hydraulic systems. The Black Country features in all parts of the automotive process from component design to manufacturing commercial, motorsport and military land vehicles.

**Key Facts**
- The sector contributes £1.5bn to the UK economy and the ambition is to grow GVA by £1.2bn by 2030.
- **36,700 people** work in Transport Technologies and **2,860 businesses** currently operate in the sector.
- The Transport Technologies sector has a higher proportion of GVA and jobs compared to the UK average. The sector accounts for 7.8% of Black Country total GVA compared to 6.4% for the UK and 7.4% of jobs compared to the UK average of 6.6%.
- The Midlands Aerospace Cluster is itself equivalent to 7% of European and 3% global aerospace output.

**Industry Profile**
- There are 120 high turnover businesses and 13 large businesses employing over 250 people.
- The sector includes international logistics operators - Geopost UK Ltd and Interlink Express Parcels Limited.
- The Black Country is home to 5 leading aerospace companies - Moog, HS Marston Aerospace, Timken, Goodrich Actuation Systems and Hampton Industries.
- The Black Country Enterprise Zone is a hub for automotive manufacturing and home to Jaguar Land Rover, the UK’s largest automotive employer.
- There is also a large proportion of SMEs that make a significant contribution to this sector including Rimstock in West Bromwich and BJS Delivery in Walsall.

**Products & Services**
- **JLR’s Engine Manufacturing Centre** is home to the high technology, low emission Ingenium diesel engine for the Range Rover Evoque, Discovery Sport and Jaguar XE car models - their first venture into in-house engine manufacturing in a generation. JLR has now revealed (Sept 2016) that production has started of four-cylinder Ingenium petrol engines.
- **CAB Automotive's** parts (interior components) go to some of the biggest automotive manufacturers in the world, including Jaguar Land Rover, Aston Martin, Nissan, Toyota and McLaren Automotive.
- **Moog** in Wolverhampton has a track record working on some of the biggest modern aircraft projects, including the F-35 Joint Strike Fighter and Boeing’s ground-breaking 787 Dreamliner. Moog also make the actuation systems that close the Wimbledon roof and that gets planes of the ground and keeps them there.
- **UTC Aerospace Systems'** Wolverhampton factory helps make vital components for jet liners made by Airbus and Boeing. (Express and Star).
- **Rimstock PLC** is the UK’s premier manufacturer and supplier of aluminium wheels with multi million pound investment in new manufacturing techniques and processes at its West Bromwich factory.
- **Keltruck Ltd** is the largest independent Scania dealer in Europe.
- **DK Rewinds** of Smethwick provides parts and undertakes repairs to London Underground trains, specialising in repairing the traction motors that power Central line trains.
- **BJS Delivery** deliver for MADE and The Cotswold Company across the UK and aim to soon be the UK’s best two-man delivery service.
Employment Profile

- The Black Country Transport Technologies sector employs 36,700 people in total. Almost 60% of employment in the sector is in the Machinery, Motor vehicles and Other transport sub sector (12,000 jobs) and Land Transport and Transport via Pipeline (10,000 jobs). 8,000 people are employed in Postal and courier activities.
- The largest jobs growth in this sector over the period 2003-2013 has been in Warehousing & Support activities. This sub sector has increased by 4,200 jobs (157% increase compared to 46% for the UK).

Centres of Excellence

- **Engineering and Computer Science Research Centre**: based at the University of Wolverhampton, the centre undertakes research in the areas of aerospace and automotive engineering, rapid manufacturing and prototyping, material science and advanced manufacturing.
- **Midlands Simulation Group**: based at the University of Wolverhampton, the group is made up of active researchers having a common interest in numerical modelling and simulation. The aim of the Midlands Simulation Group is to facilitate high quality research and development in the area of computer simulation for engineering and related industries.

Innovation

- The West Midlands Science & Innovation Audit identifies clear growth opportunities within four market driven priorities - Next Generation Transport; Medical Technologies and Pharmaceuticals; Future Food Processing; Energy and Low Carbon. The 3 LEPs have commissioned a West Midlands Combined Authority Innovation Audit to shape the action plan for building an effective innovation ecosystem to support the long-term growth of our business base and drive productivity growth.

Opportunities

**Aerospace**
- The UK aerospace industry is forecast to grow over the coming years at 6.8% per annum.
- 33,070 new aircraft are expected to be required in next 20 years, doubling of fleet from 2016 to 2035 (Global Airbus Outlook)
- Military-related production, such as at UTC Aerospace Systems and Moog, is also likely to increase over the forecast period as global military aspirations are recalibrated.
- The Aerospace Growth Partnership’s Industrial Strategy for UK Aerospace 2016 states that greener, quieter and more economical aircraft worth over £5.5 trillion will be required over the next 20 years
- £31.1bn industry turnover and £10bn GVA
- UK order backlog 9 years’ worth £195bn (ADS Aerospace Industry Report 2016)
- The Black Country Smart Specialisation Plan states that future research /tech areas will include: wings/aerodynamics; engines and propulsion and aero-structures and advanced systems. Examples of future business capabilities needed include design and manufacture for sustainability through-life; design and manufacture for lightweight vehicles, structures and devices; systems modelling and integrated design/simulation; intelligent systems and embedded electronics; smart, hybrid and multiple materials.

**Automotive**
- The outlook for the automotive sector remains strong and it is expected that over 2 million vehicles will be assembled in UK per annum by in 2020.
- The UK automotive supply chain gap that could be sourced by UK suppliers is estimated to be £3bn per annum with further opportunities for diversification into rail.
- The Black Country Smart Specialisation Plan states that future research /tech areas will include: internal combustion engines; energy storage and energy management; intelligent transport systems; lightweight vehicle and powertrain structures; electric machines and power electronics. Examples of future business capabilities
needed include design and manufacture for sustainability through life; design and manufacture for lightweight vehicles, structures and devices; automation, mechanisation and human/machine interface; intelligent systems and embedded electronic s; additive manufacturing.

- Governments’ push to reduce emissions and the move from combustion engines to EV’s with heavy batteries is likely to propel a need for lightweight materials, including composites and lighter metals such as aluminium and titanium. However, combustion engines will have a role to play for many years to come. According to a recent study, aluminium content of cars is set to reach 200kg (up from 150kg) per vehicle by 2025 (Black Country has a specialism here - 33 companies on BC Bullet). However, in many instances, the enhanced role for aluminium will be at the expense of steel usage, providing a threat to steel companies (another BC specialism - 77 firms on Bullet).

**Rail** - a number of future opportunities are expected in the rail sector including:

- **New Train for Docklands (NTfD)** - circa. 45 trains with contract award expected in Quarter 1, 2018.
- **HS2** - First phase 60 trains (165 in total) with total value of £7.5bn and contract award expected by the end of 2019.

- Advanced materials known as composites (such as carbon fibre reinforced plastic) are displacing steel and aluminium in the aerospace industry because they tend to be lighter and stronger. As the costs continue to come down for these materials, there are potential implications for the Black Country’s metal manufacturing base it has been predicted that these materials will also have a large impact in automotive. Steel is likely to be the dominant material used in cars in 2030 and beyond according to experts. But, about two-fifths of a car’s parts, by weight, have the potential to be made from composites. Just 1% of materials used in a Boeing 747 jumbo jet created in the 1970s were composites. Today, in the Boeing 787 Dreamliner, composites are more than 50% of the jet’s airframe by weight.

**Barriers**

- **Mobility Models are changing**: The evolving ‘sharing economy’ is reducing car ownership and shortening the lifecycle of cars - automotive manufacturers will need to think about how these affect their business models.
- **Electric Vehicles**: The low carbon and air quality agendas are driving rapid technological change in transport propulsion systems, threatening incumbent supply chain positions.
- **Building Information Modelling (BIM) Mandate**: To be eligible to work on Government projects (including HS2) businesses must work at BIM Level 2.
The Building Technologies sector in the Black Country includes some major international companies such as Carillion Plc. There is a strong cross sector correlation with advanced manufacturing with a high number of jobs in the manufacture of products for the construction sector.

**Key Facts**
- The sector contributes **£1.1bn** to the UK economy and the ambition is to grow the sector by a further £1bn by 2030.
- The Building Technologies sector employs **34,000 people** and there are over **4,400 companies** currently operating in the sector.

**Industry Profile**
- There are 190 high turnover (£1m+) businesses and 5 large businesses employing over 250 people.
- High profile employers in this sector include Carillion PLC, Homeserve PLC, Barhale PLC and Fortel Construction Ltd.
- There is a large proportion of SMEs that make a significant contribution to this sector. SMEs operating in the Building Technologies sector in the Black Country include Aldridge-based Midland Conservation and A&H Construction and Developments PLC in Halesowen.

**Products & Services**
- Homeserve PLC provide home emergency and repair services to over 7 million homes worldwide.
- Carillion Plc has been involved in a number of major construction projects including those of Tate Modern, the Library of Birmingham, High Speed 1 and the Copenhagen Metro.
- Barhale played a role in the redevelopment of a Victorian building that was part of the historic Smithfield meat market in London.
- Fortel have worked on major motorway projects including the central reservation works at Junction 4 of the M5, and the crossover work at M1, Junction 23A.
- Shaylor Group undertook several projects tied to the Birmingham Gateway development at Birmingham’s New Street Station.
- BriggsAmasco has installed a high performance green roof system at the British Museum’s stunning new £135 million World Conservation and Exhibitions Centre (WCEC).
- Midland Conservation has worked on a number of high-profile heritage restoration projects including Lichfield Cathedral, Snowshill Manor and the Grand Hotel on Colmore Row in Birmingham.
- A&H Construction and Developments PLC has 20 years of experience in local and regional construction projects including hotels in Bath, a distribution centre for Aston Martin in Wellesbourne and the new International Security Printers building in Wolverhampton.

**Employment Profile**
- The Black Country Building Technologies sector employs 34,000 people in total. 10,700 people are employed in specialised construction activities and over 4,000 people in the construction of buildings.
- An additional 4,300 people work in electrical installation and 3,000 people are employed in civil engineering.

**Centres of Excellence**
- **West Midlands Construction University Technical College (UTC)** - the regional construction-focussed UTC focuses on modern construction design and build professions and the application of IT in the Built Environment for students from Year 10 to Year 12.
- **Built Environment, Information Systems & Learning Technology Research Centre**: based at the University of Wolverhampton, the purpose of the centre is to research aspects of Engineering, Information Systems, the Built
Environment and Sustainability pertaining to people, process, management and education. This includes both the management and planning of technology and projects and the impact of technology on people, societies and the environment. Specific fields of interest include information systems for management, construction management, project management, technology mediated training and education, civil engineering, architecture and urban planning.

- **Stourbridge College Construction Centre**: In September 2016, Stourbridge College opened a newly refurbished £1.5 million Construction Centre, providing state-of-the-art learning facilities in the fields of carpentry and joinery, plumbing, gas and electrical installation, and the Built Environment, which includes construction management and surveying. The centre will increase the number of full-time student places and provides a purpose designed centre of excellence for them to study in.

**Opportunities**

- The Government has forecast that the global construction market will **grow by over 70%** by 2025.

- **Global increases in population** (forecasted to reach 9 billion over the next 40 years) will create major power, water, transport and other infrastructure opportunities.

- A number of new domestic infrastructure projects, most notably **HS2**, will require much construction input, giving the sector lots of activity opportunity. The Black Country’s close proximity to parts of the HS2 route means that local construction companies are sure to be involved.

- The Black Country Smart Specialisation Plan states that future UK research/tech areas include: Low carbon and sustainable construction; integrated city systems technology. Future business capabilities include: Smart, hybrid and multiple materials; automation, mechanisation and human/machine interface; Building Information Modelling Technologies (BIM) and Zero-carbon building and efficiency measures.

- **BIM**, a multi-dimensional tool which involves generating a visual model of a building whilst managing data about it throughout its whole life-phase, is enhancing collaboration in construction – leading to quality augmentation, cost reduction, and carbon savings. BIM adoption has increased massively in the last few years, helped by the Government’s mandate of only allowing companies proficient in BIM Level 2 eligible for work on state projects. Growing usage of BIM in UK construction will only make projects more efficient and integrated, ensuring a quality built environment.

- A digitally engineered BIM-compatible supply chain showcase, **West Midlands Virtual Hospital**, will support the design, construction, and facilities management of the real-life £353m Midland Metropolitan Hospital in Sandwell. Aligned with this, **BIMwm**, a local framework for BIM, will ensure local businesses acquire the knowledge, software and skills needed for BIM adoption - uplifting their capabilities for contracts requiring this technology. Local companies therefore have a strong support network helping them maximise the BIM opportunity.

- The desire for more environmentally friendly products and impact of environmental legislation will be a driver of **demand for low carbon construction** products and services. Construction is a critical sector in terms of achieving UK climate change targets.

**Barriers**

- A skills shortage exists within the sector - based on existing workforce age and current levels of new entrant attraction, within a decade there could be a 20-25% decline in the available labour force in Britain.

- The availability of migrant labour in providing capacity in UK construction, of which the sector is often reliant upon, may now be affected following Brexit.

- Construction industry is chronically underinvested due to a combination of economic, market and behavioural factors.

- The Farmer Review (October 2016) identifies a number of other issues within the sector, including low productivity, lack of collaboration, structural fragmentation, and low industry image.
The Business Services sector is a major strength for the Black Country. The sector comprises of a wide range of services including recruitment agencies, industrial cleaning and advertising and market research. It also covers activities linked to the other priority sectors, for example hire and sale of non-mechanical plant to the construction industry; commercial and technical support services for the sale of nutritional analyses in the food industries; design consultants for the motor industry and environmental contractors.

Key Facts
- The Business Services sector contributes £4.7bn to the UK economy, the highest contribution of all of the Black Country’s key sectors (24.5%). The ambition is for the sector to grow by £6bn by 2030.
- This sector employs 73,000 people and is the 3rd highest sector for employment in the Black Country.
- There are 8,810 companies currently operating in the Business Services sector.

Industry Profile
- There are 185 high turnover (£1m+) businesses and 16 large businesses employing over 250 people.
- Over 40% of the high turnover businesses are concentrated in 4 sub sectors: Other personal service activities (30 businesses); Temporary employment agency activities (19 businesses); Letting and operating of own or leased real estate (16 businesses); Other business support service activities (14 businesses).
- High profile employers in this sector include RAC Group Ltd, Charter Court Financial Services and Andrew Sykes Group PLC. Listed companies in this sector include A & J Mucklow Group Plc.
- Jonathan Lee Contracts Ltd is listed in the 1,000 Companies to Inspire Britain 2016.
- Charter Court Financial Services (CCFS) was established in 2008 with 28 staff and now employs over 350 people at its headquarters in Wolverhampton. Ranked 10th in the Sunday Times Best 100 companies to work for in 2016, the company is expanding its Wolverhampton Headquarters, doubling its workforce to 700 over the next few years.

Products & Services
- Charter Court Financial Services owns Precise Mortgages, an intermediary mortgage lender and Charter Savings Bank, one of the UK’s leading challenger banks with over 40,000 savings accounts and balances in excess of £2billion since its launch in March 2015.
- The Express & Star is the biggest selling regional newspaper in the UK.
- In 2014, RAC attended 2.3 million rescue breakdowns.
- Andrew Sykes Group’s air conditioning division linked up with the GB rowing team for their trip to Rio 2016, providing the team with around 20 Polar Wind Plus portable units - ensuring each athlete remained cool during a vital phase of competition preparation.
- A & J Mucklow Group Plc is the largest quoted investment property company in the Midlands.
- ADAS is the UK’s largest independent provider of agricultural and environmental consultancy, rural development services and policy advice.

Employment Profile
- The Black Country Business Services sector employs 73,000 people in total. The highest proportion of jobs in the Business Services sector is in Activities of Membership, repair of computers and other personal service activities (17%). Other key sub sectors in the Black Country are: Employment activities (12%); Real Estate activities (11%) and Legal and accounting activities (10%).
- The largest jobs growth in this sector over the period 2003-2013 has been in Activities of head offices. This sub sector has increased by 4,600 jobs (160% increase compared to 72% for the UK).
Centres of Excellence

- **Black Country Colleges**: offering a range of subjects including Accounting & Finance, Administration, Business Management, Business Administration & Law and Information Communication & Technology.

Opportunities

- **Fintech** - Financial Technology - emerging financial services sector enabling businesses to efficiently offer an increasing range of services to customers with opportunities for growth in tech start-ups and SMEs.
- The rise in business services employment has been striking in recent decades, associated partly with outsourcing from other sectors and partly with strong growth in professional areas like law, accounting, consultancy and real estate services.
- Business services could create around **1.5 million more jobs by 2025** (PWC).
- The sector has experienced the strongest growth since 1978 and now employs over 6 million people as well as being a major contributor to UK exports and productivity growth (PWC).
- **Increased digital adoption** and the use of big data is offering recruitment agencies access to a wider pool of talent - this will only extend as digitisation continues.
- This increased digitisation will enhance the already **growing demand for IT services**.

Barriers

- There is growing concerns surrounding **cyber-attacks**, which have the potential to threaten all types of businesses, especially banks and those in other financial services.
- More **informal lending** such as peer-to-peer lending services and insurance and low-cost online-only challenger banks are threatening traditional finance institutions. (KPMG).
- Some technology advances have the potential to replace human jobs in years to come, which could have a negative impact on recruitment agencies.
Environmental Technologies

The Environmental Technologies sector is a key sector in the Black Country and is cross cutting across all priority sectors, focusing on exploiting the opportunities from climate change and the need to reduce carbon emissions.

Key Facts
- The Environmental Technologies sector contributes £1.2bn to the UK economy and the ambition is to grow GVA by £1.1bn by 2030.
- 8,800 people work in Environmental Technologies and 210 businesses currently operate in the sector.
- The Environmental Technologies sector has a higher proportion of GVA and jobs compared to the UK average. The sector accounts for 6.5% of Black Country total GVA compared to 2.3% for the UK and 1.8% of jobs compared to the UK average of 1.1%.

Industry Profile
- There are 35 high turnover (£1m+) businesses and the majority of these businesses employing less than 250 people, with the exception of South Staffordshire Water PLC.
- Key employers include South Staffordshire Water PLC, MES Environmental Limited, Tardis Environmental UK Ltd, and ELG Carbon Fibre Ltd.

Products & Services
- ELG Carbon Fibre have developed the CARBISO™ product range, an innovative line of reclaimed carbon fibre products. CARBISO™ stands for high quality isotropic reclaimed carbon fibre products.
- As leading UK experts in precious metal recovery, JBR Recovery are one of only 2 UK companies who are physical suppliers of 'Good Delivery' silver to the London Bullion Market.
- Alutrade was involved in the recycling of materials from the opening ceremony of the London Olympic Games - specifically the Olympic Rings and the mock-up of Big Ben. The aluminium recycler was involved in the removal of seating from the water polo venue too.
- South Staffordshire Water supplies high quality drinking water to approximately 1.3m people and approximately 35,000 commercial customers.
- Using the latest technology, SB Waste Management & Recycling are able to sell 84% of their recycle material.
- The patented E-Clay® technology, comprising of a range of advanced modified clays specifically designed to treat contamination, is used solely by Envirotreat at the heart of their process.

Employment Profile
- The Black Country Environmental Technologies sector employs 8,800 people in total. 76% of employment in the Environmental Technologies sector is in Electricity, gas, steam and air conditioning.
- Jobs in the sector have increased by 4,800 jobs over the period 2003-2013 (116.5% compared to 28.7% for the UK).

Centres of Excellence
- Brownfield Research & Innovation Centre (BRIC): collaboration between Black Country LEP and University of Wolverhampton to create the Brownfield Research & Innovation Centre which will bring together the required technical expertise in brownfield development, whilst providing the research and innovation necessary to reduce the viability gap of brownfield sites. BRIC has been allocated £1.5m in EUSIF funding with 1 building being restored / built.

Innovation
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Opportunities
- Circular economy principles - the idea of recovering and repurposing products and materials at the end of life - are gathering sufficient pace (i.e. remanufacturing).
- The low carbon agenda and regulations should drive environmentally-friendly activity, increasing the demand for innovations in this sector.
- A number of new domestic infrastructure projects, notably HS2, will require environmental expertise.
Health

Health is a growing enabling sector in the Black Country. The sector includes hospital activities, medical and dental practice activities, scientific research and development, residential care and social work activities.

Key Facts
- The sector contributes £1.7bn to the UK economy and the ambition is to grow GVA by £1.5bn by 2030.
- 72,000 people work in the Health sector and 1,980 businesses currently operate in the sector.
- The Health sector is the 4th largest sector in the Black Country in terms of employment.
- The sector has a slightly higher proportion of GVA and the same proportion of jobs compared to the UK average. The sector accounts for 8.7% of Black Country total GVA compared to 7.9% for the UK and 14.5% of jobs in the Black Country.

Industry Profile
- There are 28 high turnover (£1m+) businesses and 10 large businesses employing over 250 people. 46% of the high turnover businesses are in Human Health activities and 36% operate in the Residential care activities sector.
- Key employers include Sevacare (UK) Limited, The Sandwell Community Caring Trust, Langstone Society, Country Air Ambulance Trust and Halas Homes.

Products & Services
- In 2014, Halas Homes received both the 3rd Sector Creative Arts Award & a Downing Street Community Champion Award.
- Sevacare provides over 100,000 hours of care and support each week to some 9,600 people across the country.
- Since 1991, Midlands Air Ambulance has responded to more than 46,000 missions averaging 2,000 per year.

Employment Profile
- The Black Country Health sector employs 72,000 people in total. 39,000 people (55%) are employed in Human Health activities. 19,300 people are employed in Social Work activities (27%) and 12,300 (17%) people in Residential Care activities. 1,000 people are employed across both scientific research and development and veterinary activities.
- Over the period 2003-2013, the sector has grown by over 40% (+21,000 jobs). The largest growth over this period has been in Human Health activities, which has grown by 9,000 jobs (27.9% growth rate compared to 19.3% for the UK). There was also an increase of 8,000 jobs in Social Work activities (70.4% growth compared to 37.6% for the UK).

Centres of Excellence
- Health Futures UTC: The Health Futures UTC is aimed at giving young people the necessary skills for a career in healthcare and health science professions. Students are involved in employer-led technical challenges and are regularly tested through real-life scenarios, interactive study and the use of simulation technologies.
- Stourbridge College: new facilities at Stourbridge College include a new Centre of Excellence for Early Years, Health & Social Care and IT.

Innovation
- The West Midlands Science & Innovation Audit identifies clear growth opportunities within four market driven priorities - Next Generation Transport; Medical Technologies and Pharmaceuticals; Future Food Processing; Energy and Low Carbon. The 3 LEPs have commissioned a West Midlands Combined Authority Innovation Audit to shape the action plan for building an effective innovation ecosystem to support the long-term growth of our business base and drive productivity growth.

Opportunities
- The Economist Intelligence Unit (EIU) projects that global health care spending will increase by an average of 4.3% during 2015-2019.
- International opportunities for British organisations: for example, China’s primary care market is expected to grow from £42bn in 2015 to £98bn in 2020. This type of rapid development will generate opportunities for both domestic and international players (including providers in the UK).
- West Midlands Virtual Hospital: this pioneering 3D procurement tool is designed to showcase the talent of West Midlands companies to professionals who build and operate healthcare facilities across the globe. The platform is aligned with the construction of the actual Midland Metropolitan hospital in Sandwell - a £350m development, aiming to highlight how building a hospital can impact positively on local employment, the environment and the region’s economy.
- A recent breakthrough by scientists at the University of Wolverhampton has brought the prospect of a male contraceptive pill closer to reality. A team from the university, in conjunction with Aveiro University in Portugal, has discovered that cell penetrating peptides can be designed to alter the physiology and fertilization capacity of sperm.

Commissions
- The West Midlands Mental Health Commission has been established to assess scale of issue in WM, cost, impact on public services, economy, communities; Review research and best practice; Establish costs and benefits of application to WM and Identify, consider outcome from WM work to improve mental health and wellbeing. The Commission will make recommendations to Government and Combined Authority on: How public services can be transformed to reduce impact of poor mental health and wellbeing, within resources; How resources currently spent on mental ill health can be re-directed to keep people mentally well and enable recovery; Potential for, and content of, devo deal for mental health and wellbeing and Outcomes to be delivered.
Public Sector

Public Sector is one of the five Black Country enabling sectors. Key sub sectors include Education and Public Administration & Defence.

Key Facts
- The sector contributes £2.5bn to the UK economy. GVA for this sector is forecast to grow by £0.4bn by 2030.
- 79,500 people work in the Public Sector in the Black Country and 915 businesses currently operate in the sector.
- The sector has a higher proportion of jobs in the public sector compared to the UK average. The sector accounts for 16.1% of jobs in the Black Country compared to 8.2% for the UK.

Industry Profile
- Key employers include: the Local Authorities in the area and schools as well as Compton Hospice, YMCA Wolverhampton and The Vine Trust Walsall.

Employment Profile
- The Black Country Public sector employs 79,500 people in total. 42,000 people (53%) are employed in Education. 18,000 people are employed in Public administration and defence (23%) and 17,000 (21%) people in Service to buildings and landscape. 2,500 people are employed in Security and investigation activities.
- Over the period 2003-2013, the sector has grown by 1.7% (+1,350 jobs) compared to 9.9% for the UK. The largest growth over this period has been in Education which has grown by 6,400 jobs (18%). Jobs in Public administration and defence have reduced by 29.2% (7,500 jobs) compared to a reduction of 10.6% for the UK.

Opportunities
- Developments in IT and other technologies will transform the way that people interact with authorities. Rapid, personalised & electronic interactions will replace the current slow and distant paper-based communications, allowing governments and local authorities to work faster, closer, and more responsively with all stakeholders.
- As long as the project and contractor are right, the growth of outsourcing in the public sector has the potential to improve efficiencies and service to the public.
- Increased focus on devolution will give more power to regional decision-makers, giving local institutions further authority and accountability.

Barriers
- In January 2016, the National Audit Office revealed that the number of teachers leaving the profession has increased by 11 per cent over three years, casting doubts on the attractiveness of teaching as an occupation.
- Councils are currently just over half way through a scheduled 40 per cent cut in funding from central government. With fewer resources, local authorities face a challenging future to meet their statutory responsibilities.
- The public continue to demand more from government and local authorities, providing a potential struggle for the public sector when it comes to meeting expectations. This is especially relevant in a time of drained resources.
The Retail sector, including Retailing and Wholesale trade, is the largest sector in the Black Country in employment terms.

Key Facts
The sector contributes **£2.9bn** to the UK economy and is forecast to grow by £2.5bn by 2030.
- **94,000 people** work in the Retail sector and **6,600 businesses** currently operate in the sector.
- The Retail sector has a higher proportion of GVA and jobs compared to the UK average. The sector accounts for 15% of Black Country total GVA compared to 11.7% for the UK and 19% of jobs in the Black Country compared to the UK average of 8.2%.

Industry Profile
- There are 458 high turnover (£1m+) businesses and 17 large businesses employing over 250 people. The majority of the high turnover businesses (83%) operate in the Wholesale and motor vehicles trade.
- Key employers include: **Poundland Limited**, **A.F. Blakemore & Son Ltd**, **East End Foods PLC**, **Hayley Group PLC**, **T.H. Baker Group Limited**, **Middleton Food Products Ltd** and **Direct Corporate Clothing PLC**.

Products & Services
- **intu Merry Hill** is the largest shopping centre in the Midlands and seventh largest in the UK, hosting a wide range of retail employers including Sainsbury’s, Marks & Spencer, Debenhams, Argos and Asda. Merry Hill is home to over 250 shops in total.
- Other shopping centres in the region include the **Mander Centre** and the **Wulfrun Centre**, both in Wolverhampton, and also the **Churchill Shopping Centre** in Dudley.
- **A.F. Blakemore** is the largest division of SPAR UK, owning 300 SPAR stores and serving more than 1,000 in total across England and Wales.
- Half the population now shop with **Poundland**, based in Willenhall; they serve more than 5.5 million customers each week. In 2014, Poundland sold 5.5 million boxes of Maltesers, 2.5 million umbrellas and 3 million lightbulbs.
- **East End Foods** are leading suppliers of Asian food in the UK and European market.
- Over 40 leather companies still exist in Walsall, producing goods for some of the most famous brand names and exporting to most parts of the world. Walsall has the largest concentration of leather workers in northern Europe.

Employment Profile
- The Black Country Retail sector employs 94,000 people in total. 50,500 people (54%) are employed in Retailing. 43,400 people are employed in the Wholesale and motor vehicles trade (46%).
- Over the period 2003-2013, the sector overall has seen a reduction of 1,700 jobs (-1.8%). This compared to a 3.3% reduction for the UK. There has been a slight increase of 0.2% retailing jobs.

Centres of Excellence
- **Black Country Skills Shop**: the Black Country Skills Shop, based at Merry Hill, provides employers with unique recruitment services and supports learners with training and development opportunities. The Skills Shop is part of the National Skills Academy for Retail and incorporates the Intu Academy training people for a career in the retail sector. It covers the whole of the Black Country, Shropshire, Telford and Wrekin, Herefordshire and Worcestershire and is part of Birmingham Metropolitan College. Training courses include: Pre-employment
courses for the unemployed or new businesses locating to the area; Apprenticeships or work based learning qualifications; Retail work experience; Retail customer service programmes; Retail ambassadors training; Support for small businesses.

Opportunities

- According to a recent report by the Local Data Company (LDC) and British Independent Retailers Association (Bira), independent stores opened more shops than were closed in the first half of 2016, reversing the decline seen the previous year. The West Midlands showed the greatest increase of independents at +159 units (+0.84%) in H1 2016, versus -22 units (-0.12%) in H1 2015.

- **Advances in technology** will offer retailers lots of opportunity to enhance their products, services and operations for consumers. Five disruptive forces are outlined by Deloitte: Internet of Things; Virtual reality; Robots; Driverless vehicles; Artificial intelligence.

- The growing ability of organisations to offer **personalised products** at lower prices gives consumers more choice, and will ultimately benefit the offer of retailers.

- **Omni-channel approaches** will continue to allow retailers to reach and service customers seamlessly on a variety of different platforms.

Barriers

- There is a **skills deficit** within the IT aspect of retail - an area which is becoming more and more pivotal. Currently, the sector is sometimes seen as a less attractive option for highly-skilled candidates within technology, which is a potential barrier to future growth.

- The current economic climate is beginning to cause **price rises** in retail, and this is likely to continue.

- The developing **subscription and sharing economies** are disrupting traditional business models: as more customers are choosing to subscribe to services or share goods instead of wholly owning them; retailers will need to adapt the way they approach this change in customer demand.

- **Smaller retailers remain off the pace** when it comes to online shopping.
Sports & Physical Activity is a key enabling sector for the Black Country and the importance of growing this sector is recognised in increasing the economic prosperity of the area.

Key Facts
- The sector contributes £0.1bn to the UK economy and GVA is forecast to increase by £0.1bn by 2030.
- 6,000 people work in the Black Country Sports sector and 260 businesses currently operate in the sector.
- The Sports sector has a slightly lower proportion of GVA and jobs compared to the UK average. The sector accounts for 0.5% of Black Country total GVA compared to 0.7% for the UK and 1.2% of jobs in the Black Country compared to 1.6% for the UK.
- The Black Country has one of the lowest levels of physical inactivity in England (73,100 gap).

Industry Profile
- There are 6 high turnover (£1m+) businesses; all of these businesses employ less than 250 people.
- Key employers include: West Bromwich Albion Football Club, Wolverhampton Wanderers Football Club, Sandwell Leisure Trust and Walsall Football Club.

Products & Services
- Sandwell Leisure Trust was named the ‘Best National Small Chain’ in 2013 and 2014 at the Members’ Choice Health Club Awards.
- Combined, the three Black Country football clubs’ stadiums can host 70,000 supporters.
- Walsall’s Bescot Stadium has been host to England women’s international matches, as well as men’s under-21, under-19 and under-17 ones.
- Black Country based businesses contributed one of the highest levels outside of London and the South East to the construction of the London Olympics site, including RMD Kwikform, who worked on the Aquatics Centre, and Zaun Fencing who supplied the fences surrounding the Olympic park.

Employment Profile
- Employment in the Sports sector in the Black Country is starting to increase, with 3% growth between 2012 and 2013 (170 jobs).

Opportunities
- **Sports Skills Factory:** The Sport Skills Factory, launched Autumn 2016, will be a virtual factory that will provide a framework and platform to promote innovative information, advice and guidance on the value, pathway, destinations, and skills required across the sector; coordinate and broker training/CPD to both new and existing workforce to meet the identified demand, including an employer demand led apprenticeship training programme and work with providers, employers and organisations to embed the findings of the SSAP and facilitate a demand-led skills development system.
- Ambition to get everyone active and Government expectation that physical activity contributes to social and economic development.
- The rapid growth of smart wearable devices is opening a new market in this industry.

Barriers
- **Child obesity** has shown recent signs of rising in England, threatening the stature and credibility of the sports industry.
- 73,100 physical gap between the Black Country and England average with physical activity being the world’s fourth largest killer.
- Sport & Physical Activity being a discretionary rather than a mandatory service.
The Visitor Economy is recognised as a key enabling sector for the Black Country, creating local distinctiveness and creating and supporting jobs in the area. In 2015, there were 28 million visitors to the Black Country.

Key Facts
- The sector contributes £0.5bn to the UK economy and GVA is forecast to grow by £0.4bn by 2030.
- 25,000 people work in the Visitor Economy sector and 2,065 businesses currently operate in the sector.
- The sector has a slightly higher proportion of GVA and the same proportion of jobs compared to the UK average. The sector accounts for 8.7% of Black Country total GVA compared to 7.9% for the UK and 14.5% of jobs in the Black Country.

Industry Profile
- There are 24 high turnover (£1m+) businesses and 5 large businesses employing over 250 people. 75% of the high turnover businesses operate in the Food & Beverage Services sector.
- Key companies include: Marston’s PLC, Black Country Living Museum, The Fairlawns Hotel and the Wolverhampton Grand Theatre.

Products & Services
- A leading brewer of premium cask and bottled beers, Marston’s operate over 1,700 pubs and 5 breweries in the UK.
- Across 26 acres of exploration, The Black Country Living Museum recreates the area’s proud industrial heritage, attracting almost 300,000 visitors annually in recent years. The hit television series Peaky Blinders has used the premises for filming.
- Wolverhampton Grand Theatre is host to an array of performances and in the past has welcomed famous names including Charlie Chaplin, Sir Ian McKellan and Sean Connery.
- With a focus on international conservation and breeding programmes for endangered species, Dudley Zoo is home to more than 1300 animals, of which inhabit an ancient wooded hillside around the ruins of Dudley Castle.
- Several of Dudley Zoo’s global projects have won awards, including the Zoo recently being recognised as part of a successful effort to save the UK’s rarest and biggest arachnid, the fen raft spider.
- The Dudley Canal Trust run regular guided boat trips with additional entertainment such as music and light shows, attracting over 80,000 visitors each year. The Trust formed in the mid-20th century to protect the canal network and all profit is re-invested in maintaining the tunnels and their environment. In September 2016, the organisation won the Canal and River Trust’s Living Waterways Award, and earlier in the year a new £3 million visitor and heritage centre opened.

Employment Profile
- The Black Country Visitor Economy sector employs 25,000 people in total. 17,800 people (72%) are employed in Food & Beverage Service activities. 5,000 people are employed in Arts, entertainment and gambling activities (20%).

Opportunities
- In the latest Visitor Attraction survey by VisitEngland, the West Midlands had the joint strongest growth in tourist attraction of all UK regions, suggesting that there is growing demand for the region’s attractions.
- In the short-term, the devaluation of the pound is incentivising overseas tourists to visit the UK.
- Improved booking and marketing tools will offer attractions and hotels greater reach when accessing potential customers.
- The borders between many countries have become easier to cross, and new economies are emerging that make new places seem more accessible than ever.
- The middle-class population is expected to increase further, up to 4.9 billion by 2030, creating a wider customer base for the visitor economy.
- “Staycations” have been steadily gaining popularity, giving a boost to domestic destinations like the Black Country.
- A major £20m revamp of the Black Country Living Museum looks set to go ahead: proposals include creating a new 1940s-style town & moving the current Tipton Road entrance to Castle Hill in order to link the site with Dudley Zoo, the Canal Trust and Dudley Archives. Linking these four venues together would provide visitors with one shared arrival point for four of the
Black Country’s biggest tourist attractions.

- **Black Country Geopark:** The Black Country has a large number of unique and heritage features and sites of interest ranging from the Wren’s Nest National Nature Reserve, to canal networks, caverns and structures, museums and art galleries, an 11th century castle, industrial structures and parklands and wildlife sites. It is hoped that the above sites will form the Black Country UNESCO Global Geopark as it bids for this status in 2016 to showcase its geology, culture and heritage internationally. This will not only boost the local economy but will provide a host of new opportunities for learning and inspiration.

**Barriers**

- Experts have warned of the negative effects of a ‘hard’ Brexit for the visitor economy: it’s been suggested that the UK could see two million fewer visitors by 2020 if this is the arrangement.
- The growing availability of free information, entertainment and attractions online can only damage the appeal of physical attractions which come with a cost.
- Political tension, terrorism and unrest are unpredictable and impose a threat to tourism in any destination.
Appendix 2b - Black Country Sector Dashboards

We have developed a dashboard for each sector to enable us to target our action to support economic growth. The dashboards list the leading businesses in each sector, chart progress in GVA, jobs and business formation. They also map the location of top performing businesses and the strength of the local supply chain.

All of the dashboards include:

- The scale of GVA, jobs and businesses for each sector in relation to the total Black Country numbers and the comparison of the proportion of GVA and jobs to the national average.
- An overview of the growth ambitions for GVA and jobs in each sector compared to the current position and the 2004 baseline.
- A comparison of growth rates for GVA and jobs to the national average growth rate.
- An analysis of the component sub sectors, highlighting the most important sub sectors for the Black Country and the UK in terms of GVA and jobs.
- The density of businesses and growth rates in the Black Country compared to the West Midlands LEP areas.

For the transformational sectors, they dashboards also include:

- A list of the top performing businesses in each sector with an analysis of financial records to establish GVA contribution, average GVA per employee, GVA per employee comparisons against the UK average for each sector and GVA growth rates and an overview of the ownership of these businesses.
- An assessment of the GVA impact of the leading businesses - Low (£0-£49,999m); Medium (£50,000-£99,999m); High (£100m+)
- Analysis of the sectors that the top businesses operate in using the FTSE Industry Classification Benchmark (ICB) Industry Structure and Definitions to identify high value added sectors.
- A map to show the location of the top performing businesses.
- An analysis of the local supply chain for Advanced Manufacturing, Transport Technologies and Building Technologies.
BLACK COUNTRY SEP : Sector Dashboards

TRANSFORMATIONAL SECTORS
- Advanced Manufacturing
- Building Technologies
- Business Services
- Environmental Technologies
- Transport Technologies

ENABLING SECTORS
- Health
- Public Sector
- Retail
- Sports
- Visitor Economy
BLACK COUNTRY SECTOR DASHBOARD - Advanced Manufacturing

GVA Growth
- GVA generated by the top 50 businesses has increased by 5.8% over 5 year period
- 21 of the top 50 businesses have increased GVA over 1 year period
- 18 businesses have increased GVA by 30% or over
- 21 businesses have increased GVA by 10% and over
- 10 companies in the top 50 have foreign owned
- The largest foreign owned company in the top 50 is owned by "" (company name)
- The largest number of global owners are in the USA (13 businesses)
- Average GVA per employee for these businesses is £92,100
- GVA for these businesses has increased by 2.8% over a 5 year period
- 7 businesses are listed on the London Stock Exchange - Gestrics PLC and Chamberlain PLC

GVA Impact (£K)

- 5% of the top 25 businesses (5 businesses) generate £70K GVA
- 1 business generates over £100K, accounting for 7% of total GVA generated by the top 50 businesses

Supply Chain/Market Position
- Analysis of the supply chain position of the top 50 businesses in this sector shows that 5% of businesses are classified as Level 1 and the majority of businesses are classified as Level 5.

Sub Sector Analysis
- 10% of GVA generated by the top 50 businesses is concentrated in 2 sub-sectors: Food Processors (8.4%) and General Industries (12.7%)
- These two sub-sectors are Food Processors and General Industries. However, this sub-sector has the second lowest GVA per employee.
- General Industries also has the highest number of businesses in the top 50 (18 businesses). The majority of businesses in this sub-sector generate under £10K GVA.
- Automotive & Parts has the highest average GVA per employee (£82,600)
- All sub-sectors have seen GVA growth over a one-year period, with the exception of the Chemicals sub-sector. 2 sub-sectors experienced growth above 20%. Healthcare Equipment & Services saw the highest growth rate (40.8%).
<table>
<thead>
<tr>
<th>Country</th>
<th>Sector</th>
<th>Technology</th>
<th>Investment</th>
<th>Jobs</th>
<th>Carbon Mitigation</th>
<th>Energy Efficiency</th>
<th>Innovation</th>
<th>Total</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>Energy</td>
<td>Solar</td>
<td>$120M</td>
<td>100</td>
<td>High</td>
<td>High</td>
<td>Moderate</td>
<td>200</td>
<td>Notes</td>
</tr>
<tr>
<td>India</td>
<td>Agriculture</td>
<td>Wind</td>
<td>$50M</td>
<td>50</td>
<td>Low</td>
<td>Low</td>
<td>High</td>
<td>100</td>
<td>Notes</td>
</tr>
<tr>
<td>Japan</td>
<td>Manufacturing</td>
<td>Hydro</td>
<td>$80M</td>
<td>80</td>
<td>Medium</td>
<td>Medium</td>
<td>High</td>
<td>160</td>
<td>Notes</td>
</tr>
<tr>
<td>Brazil</td>
<td>Mining</td>
<td>Nuclear</td>
<td>$150M</td>
<td>150</td>
<td>Very High</td>
<td>Very High</td>
<td>Low</td>
<td>300</td>
<td>Notes</td>
</tr>
</tbody>
</table>

**Notes:**
- High: Significant investment and job creation.
- Medium: Moderate investment and job creation.
- Low: Limited investment and job creation.
# BLACK COUNTRY SECTOR DASHBOARD - Business Services

### GVA Growth
- GVA generated by the top 50 businesses has increased by 14.7% over 3yrs period
- 16 of the top 50 businesses have increased GVA over a 3yr period
- 8 businesses have increased GVA by 50% or over
- 18 businesses have increased GVA by 10% and over

### Foreign Ownership & Listing
- 8 companies in the top 50 are foreign owned
- Countries of ownership are Luxembourg, Germany & USA
- The largest foreign owned company in the top 50 is ranked 7th - BDO Haining (China) Ltd
- Average GVA per employee for these businesses is £242,000
- 5 businesses are listed on the London Stock Exchange - MGA Distribution, PLC and Andrews Sykes Group PLC

### GVA Impact (£m)

- 95% of the top 50 businesses are generating over 40% of all GVA
- A business generates over 40% GVA, accounting for 95% of total GVA generated by the top 50 businesses

### Sub-Sector Analysis
- Almost 75% of GVA generated by the top 50 businesses is concentrated in 1 sub-sector: Support Services
- The high GVA businesses are in the Support Services sub-sector
- Financial Services has the highest average GVA per employee
- 20 sub-sectors have seen GVA growth over a three year period

### Business Services US average GVA per employee - £97,162
Businesses detailed in above table have above average GVA per employee - 11 (27%)
## Black Country Sector Dashboard - Environmental Technologies

### Key Statistics
- **GVA Growth**: GVA generated by the businesses in this sector has increased by 8% over the period.
- **Businesses**: 23 of the 24 businesses have increased GVA over the period.
- **Job Creation**: 15 businesses have increased jobs by 10% and over.

### Performance by Sub-Category

#### Sub-Sector Analysis
- **GVA Growth**: 87% of GVA generated by Environmental Technologies businesses concentrated in 1 sub-sector.
- **Job Creation**: There are no high job gain businesses in this sector.
- **Support Services**: Has the highest number of businesses in the sector (53 businesses) generating 33% of the total GVA.
- **Gas, Water & Multi-Utilities**: Has the highest average GVA per employee (£310k).
- **All sub-sectors have seen GVA growth of over 10% per year, with Support Services having the highest growth rate (28%).
- **Gas, Water & Multi-Utilities**: Has the highest GVA costs ratio above the average for the top 50 (131.29%)

### Top 20 Performing Companies in Environmental Technologies Sector

#### Top Performing Companies

<table>
<thead>
<tr>
<th>Rank</th>
<th>Company Name</th>
<th>GVA (k)</th>
<th>Jobs (k)</th>
<th>GVA/jobs Ratio</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Company A</td>
<td>120</td>
<td>50</td>
<td>2.40</td>
</tr>
<tr>
<td>2</td>
<td>Company B</td>
<td>90</td>
<td>30</td>
<td>3.00</td>
</tr>
<tr>
<td>3</td>
<td>Company C</td>
<td>80</td>
<td>25</td>
<td>3.20</td>
</tr>
<tr>
<td>4</td>
<td>Company D</td>
<td>70</td>
<td>20</td>
<td>3.50</td>
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<tr>
<td>5</td>
<td>Company E</td>
<td>60</td>
<td>15</td>
<td>4.00</td>
</tr>
</tbody>
</table>

### Geographic Overview

- The map shows the distribution of businesses across the Black Country region.
- The legend provides key data points for each area.

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*Note: Data is as of [current date]."
### Transport Technologies

#### GVA Growth
- GVA generated by the top 50 businesses has increased by 5.5% over 5yr period.
- 26% of these 50 businesses have increased GVA over a 5yr period.
- 28% of these 50 businesses have increased GVA by 10% or over.
- 25 businesses have increased GVA by 15% or over.
- 18 companies in the top 50 are foreign owned.
- The largest foreign owned company in the top 50 is Smit Kraven Limited.
- The largest number of GVA generated is in the USA (42 businesses).  
- Average GVA per employee for these businesses is £203,956.
- GVA for these businesses has increased by 5% over a 5yr period.
- 1 business is listed on the London Stock Exchange - Route 4.

#### GVA Impact (£m)

<table>
<thead>
<tr>
<th>Sub-sector</th>
<th>No. of Businesses</th>
<th>GVA (£m)</th>
<th>GVA Impact (£m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aeronautics &amp; defence</td>
<td>1</td>
<td>4,678,930</td>
<td>1</td>
</tr>
<tr>
<td>Automotive &amp; Parts</td>
<td>1</td>
<td>12,722,612</td>
<td>12</td>
</tr>
<tr>
<td>Industrial engineering</td>
<td>1</td>
<td>12,512,789</td>
<td>12</td>
</tr>
<tr>
<td>Defence &amp; Aerospace</td>
<td>2</td>
<td>12,722,612</td>
<td>12</td>
</tr>
<tr>
<td>Total</td>
<td>5</td>
<td>39,523,233</td>
<td>39</td>
</tr>
</tbody>
</table>

#### Sub-sector Analysis
- 85% of GVA generated by the top 50 businesses is concentrated in 3 sub-sectors: Aeronautics & defence, Automotive & Parts and Industrial engineering.
- The two high GVA businesses are Aeronautics & defence and Industrial engineering.
- Aeronautics & defence has the highest number of businesses in the top 50 (11 businesses).
- Aeronautics & defence also has the highest GVA per employee (34%).
- All sub-sectors have seen GVA growth over a 5yr period - Aeronautics & defence has the highest growth rate at around 18.5%.

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Transport Technologies: UK average GVA per employee: £46,882

Businesses: 39 (in this table are 36) average GVA per employee: £2,015,372

Location of top performing businesses:
- 8 of the top 10 performing companies are located in either existing or potentially high quality employment (and 3 in existing & 3 in potential).
- The top company is in an existing high quality location.

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31
BLACK COUNTRY SECTOR DASHBOARD - Visitor Economy

**GVA**
- Current GVA: £0.5bn
- Growth Ambition: £0.8bn
- Growth Rates 2010 - 2013: BC: +3.0% (+2.4bn), UK: +1.3%
- Most important sector: Food and Beverage

**JOBS**
- Current Jobs: 25,000
- Growth Ambition: 33,000
- Growth Rates 2010 - 2013: BC: +1.9% (+8,000 Jobs), UK: 6.1%
- Most important sector: Food and Beverage

**BUSINESSES**
- Current Businesses: 2,065
- Growth Rates 2011 - 2016: +20.4%
- Most important sector: Arts, entertainment and gambling

**Visitors & Economy**
- Visitors: 48.4%
- Economy: 33.1%
- Arts: 3.4%
- Entertainment: 1.8%
- Accommodation: 0.7%

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