

SECTOR PROFILE:

WORCESTERSHIRE'S AGRI-TECH SECTOR

WHAT IS THE AGRI-TECH SECTOR IN WORCESTERSHIRE?

The Agri-Tech sector is one of Worcestershire's top three growth sectors. This sector is vital to the economic prosperity of the County. Agri-Tech is a fast-growing industry focused on improving traditional forms of farming through technology. Agri-Tech is a term that is used nationally to cover research and innovation in the agricultural industry, including horticulture, to increase yield, profit, turnover, and business growth.

The Agri-Tech industry focuses on tools and techniques to improve Agri-Food productivity; enabling technologies in engineering, robotics, ICT, and data; primary production, and food manufacture and logistics.

Gross value added (GVA) is an economic productivity metric that measures the contribution of a corporate subsidiary, company, or municipality to an economy, producer, sector, or region



15,000
PEOPLE
EMPLOYED



2,060
BUSINESSES

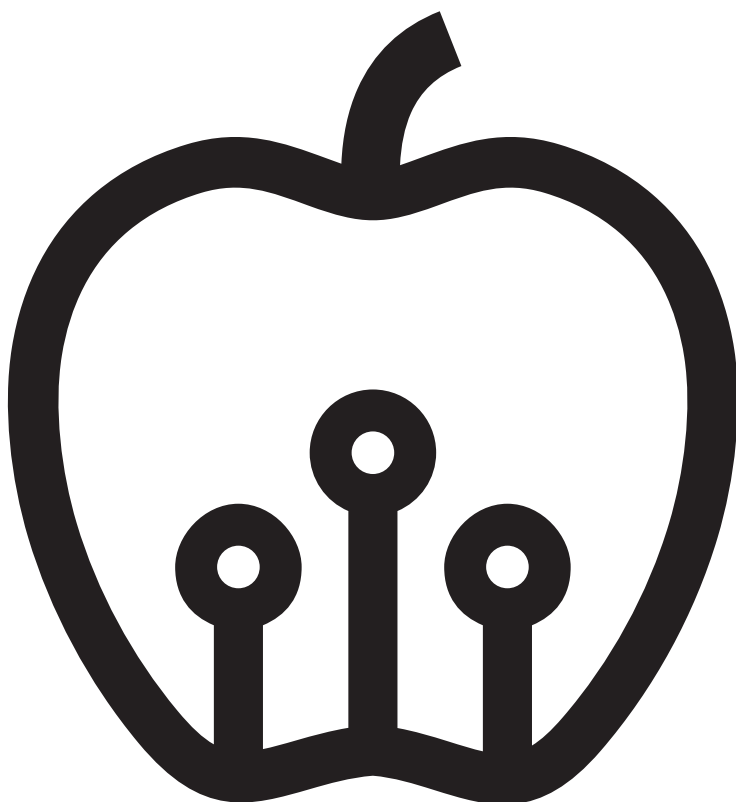
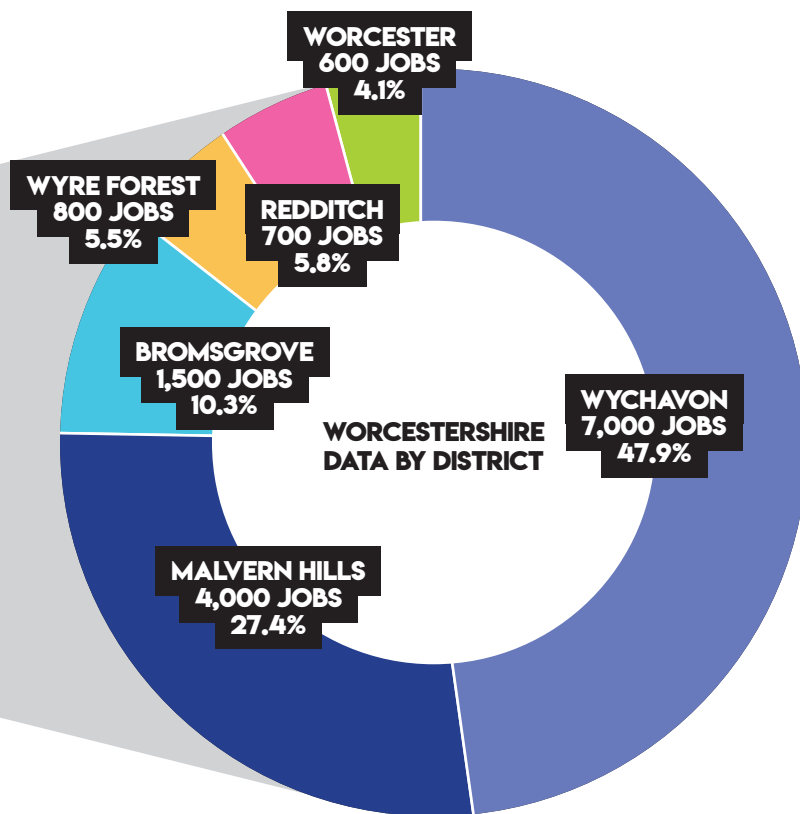
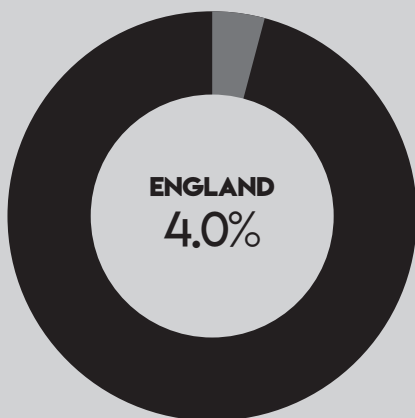
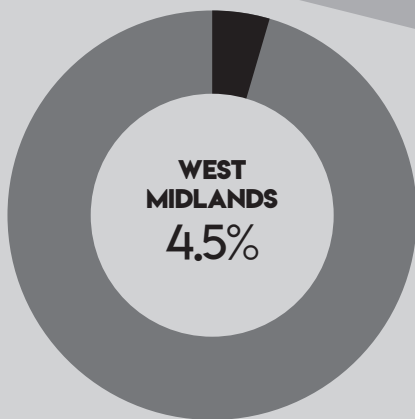
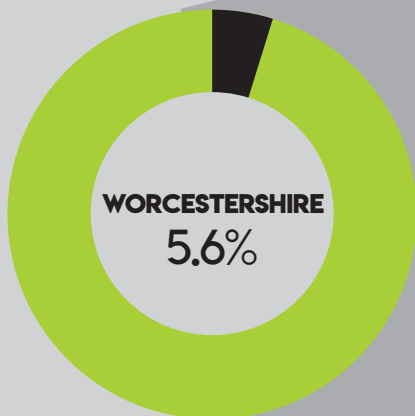


£217M GVA
GENERATED
BY TOP 50
BUSINESSES

WHAT DOES THE AGRI-TECH SECTOR LOOK LIKE IN WORCESTERSHIRE?

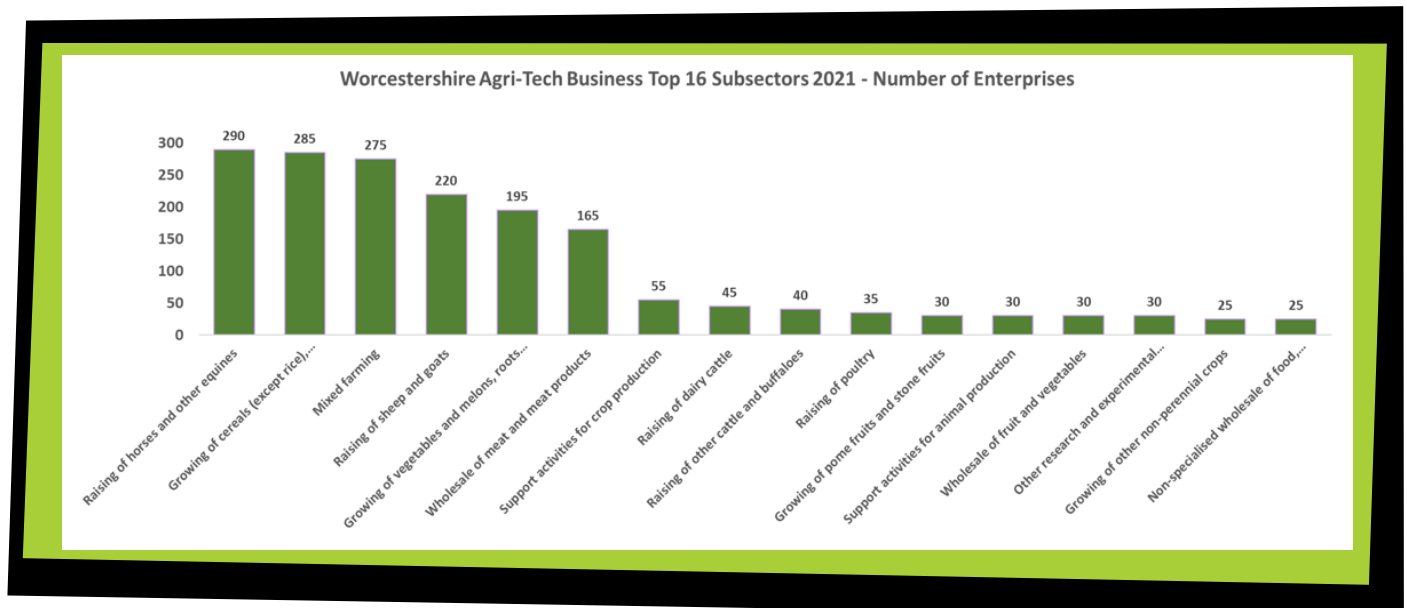
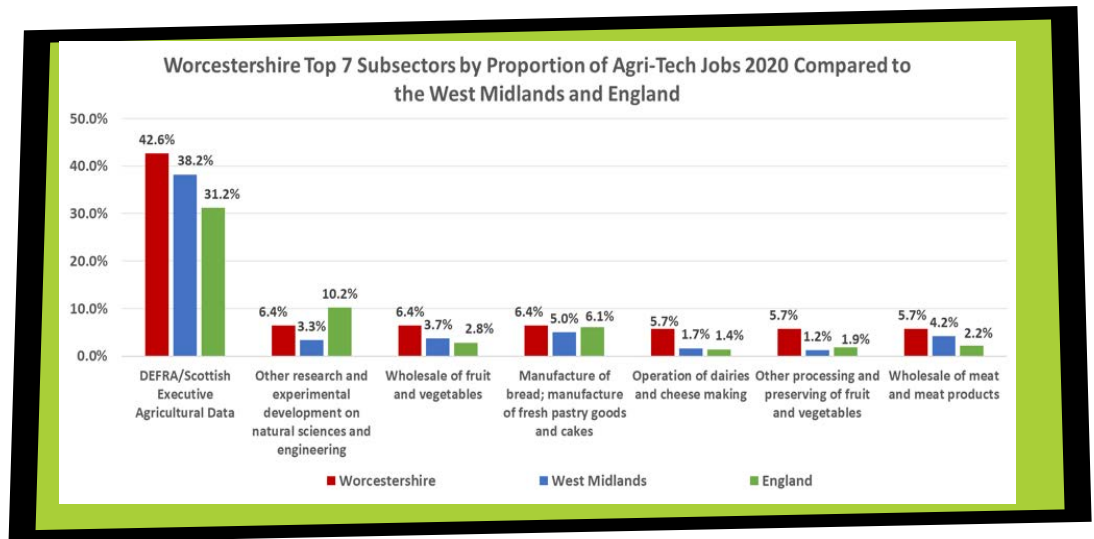
The graphs below highlight the number of Agri-Tech jobs in Worcestershire in comparison to both the West Midlands and England. This emphasises the importance of the Agri-Tech industry throughout the county as a key employment industry, and shows which districts employ the most individuals into Agri-Tech job roles.

CONSTRUCTION JOBS AS A % OF TOTAL WORKFORCE



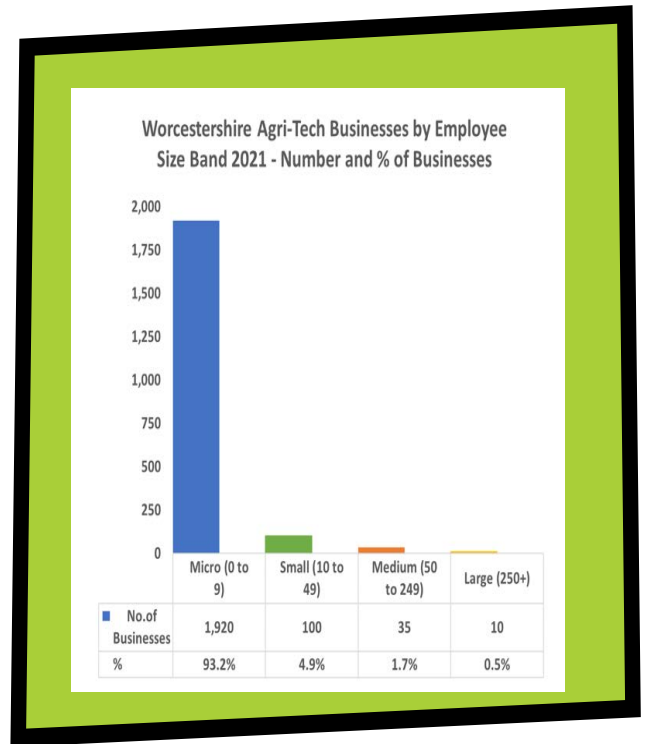
KEY FACTS:

- Currently there are 15,000 people employed in Worcestershire's Agri-Tech sector
- Proportion of total employment in Worcestershire's Agri-tech sector (5.6%) is higher than the West Midlands average (4.5%) and the England average (4.0%)
- Worcestershire was placed in 11th highest out of all LEP areas when looking at Agri-Tech jobs as a % of total jobs
- Employment in Worcestershire's Agri-tech sector has increased by +1,000 jobs between 2019 and 2020
- Highest proportion of Agri-Tech employment in Worcestershire is in DEFRA/Scottish Executive Agricultural Data (42.6%, or 6,000 jobs) - higher than the England average (31.2%)
- In 6 out of the top 7 sectors Worcestershire has a higher proportion of Agri-Tech jobs than both the West Midlands and England average



- The top 3 Agri-Tech subsectors in Worcestershire are: Raising of horses and other equines, Growing of cereals (except rice), leguminous crops & oil seeds and Mixed farming

> The largest proportion of Worcestershire's Agri-Tech businesses are micro businesses employing 0-9 people (93.2%). Small businesses employing 10-49 people account for 4.9% of businesses and medium sized businesses employing 50-249 people account for 1.7%



TOP 10 WORCESTERSHIRE AGRI-TECH EMPLOYERS

1.

KANES FOODS LIMITED

Manufacture of prepared meals and dishes

WYCHAVON

2.

PRIMAFRUIT LIMITED

Wholesale of fruit and vegetables

WYCHAVON

3.

CP FOODS (UK)LIMITED

Wholesale of meat and meat products

WYCHAVON

4.

SPRINGHILLFARMS (PERSHORE)

Limited Wholesale of fruit and vegetables

WYCHAVON

5.

DLF SEEDS LTD.

Seed processing for propagation

WYCHAVON

6.

STRICKLAND TRACKS LIMITED

Manufacture of agricultural machiners, equipment and supplies

WYCHAVON

7.

LALLEMAND ANIMAL UK LIMITED

Manufacture of prepared feeds for farm animals

MALVERN HILLS

8.

DAWN FOODS LIMITED

Manufacture of other food products

WYCHAVON

9.

BLUE EARTHFOODS LIMITED

Processing and preserving of fish, crustaceans and molluscs

REDDITCH

10.

WESTBRIDGEFOOD GROUP

Agents involved in the sale of food, beverages and tobacco

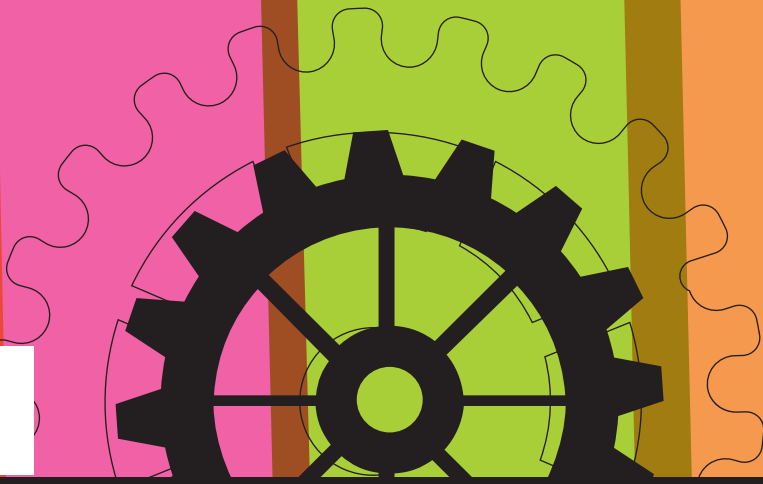
MALVERN HILLS

MADE IN WORCS

- > **DLF Seeds** is one of the leading producers of grass and specialist seeds in the UK including grass seeds, wildflowers, maize & bioenergy crops. As part of the global DLF Group the company is involved in an extensive research and development programme focussed on improving the reliability and quality of grass and forage varieties.
- > Hydroponics play a key part in tomato production at **Springhill Farms (Pershore.)** Other innovative production methods include the use of a waste wood burning boiler to heat the greenhouse and an anaerobic digestion plant that captures CO2 and feeds it back into the glass houses to aid with photosynthesis.
- > Starting from a small holding in the 1960's, **Bumble Hole Foods** is now one of the leading suppliers of eggs and egg products to the UK food production sector. This includes a state-of-the-art processing facility which can provide around 2.5 million hard boiled eggs per week.
- > **Lallemand Animal Nutrition** are specialists in the development of fermentation products for animal nutrition using yeasts and bacteria.
- > Supplying around 1.7 million plants per year to the UK Garden Centre sector **Bransford Garden Plants** operates from a nine-acre site in Worcestershire. The company uses biological controls for pests in their protected growing areas resulting in lower levels of insecticides being used.
- > **Well Hopped** is a hop merchant, factor and grower that has been in business since 1865. The company has a hop development programme that introduces 1-2 new hop varieties every year and is run through growing and development partners in the USA, Slovenia, Czech Republic, Poland, and the UK.

FUTURE OPPORTUNITIES

- > **Artificial Intelligence** and **data analytics** are making inroads into the Agri-Tech sector in many forms. From robotic fruit pickers to the use of drones and GPS mapping to show when crops are ripe for harvest or need watering.
- > The roll out of the **5G and broadband programme** in Worcestershire will be crucial in enabling developers and producers to use GPS, drones, and robotics efficiently and effectively.
- > The **Agri-Tech West Alliance** has developed wider relationships which can provide testing grounds for new products to be trialled on the ground such as Harper Adams with technologies and Keele University's specialism in dairy.
- > The **Agriculture Bill** was passed into UK law in November 2020, introducing changes to future payments to farmers and land managers to focus on "public goods," many of which provide opportunities for the use of technology, AI, and data analytics. This includes improving soil and air quality, introducing methods to help wildlife thrive, and sustainable food production.
- > Worcestershire has key assets in the Agri-Tech sector. The **University of Worcester** is home to the **National Pollen and Aerobiology Unit** which has been producing pollen forecasts since 1995.
- > **Pershore College** is a national centre for horticulture and houses an **Agri-Tech Research Centre**. This has been designed to develop, demonstrate, and make accessible progress in the sector such as continuous research and improvements in hydroponics and vertical farming.



SECTOR PROFILE:

WORCESTERSHIRE'S ADVANCED MANUFACTURING & ENGINEERING SECTOR (AME)

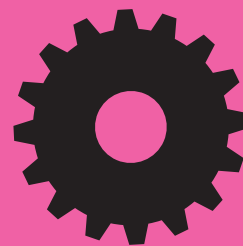
WHAT IS THE ADVANCED MANUFACTURING AND ENGINEERING SECTOR?

The Advanced Manufacturing and Engineering (AME) sector is one of Worcestershire's priority sectors and is key to the future growth of Worcestershire's economy, particularly in driving innovation and increasing productivity and capturing high value activity and passing these gains through the local supply chain. The sector includes a number of sub sectors ranging from the manufacture of metals and machinery, paper and plastic products, motor vehicles and computer, electronic and optical products.

Gross value added (GVA) is an economic productivity metric that measures the contribution of a corporate subsidiary, company, or municipality to an economy, producer, sector, or region



28,130
PEOPLE
EMPLOYED



2,270
BUSINESSES

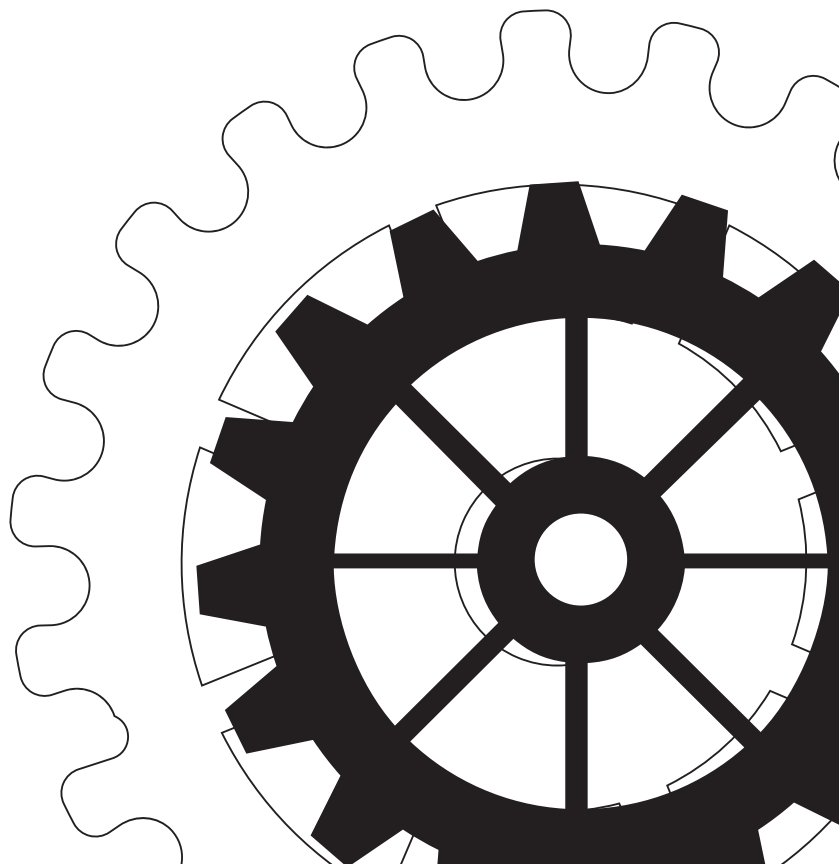
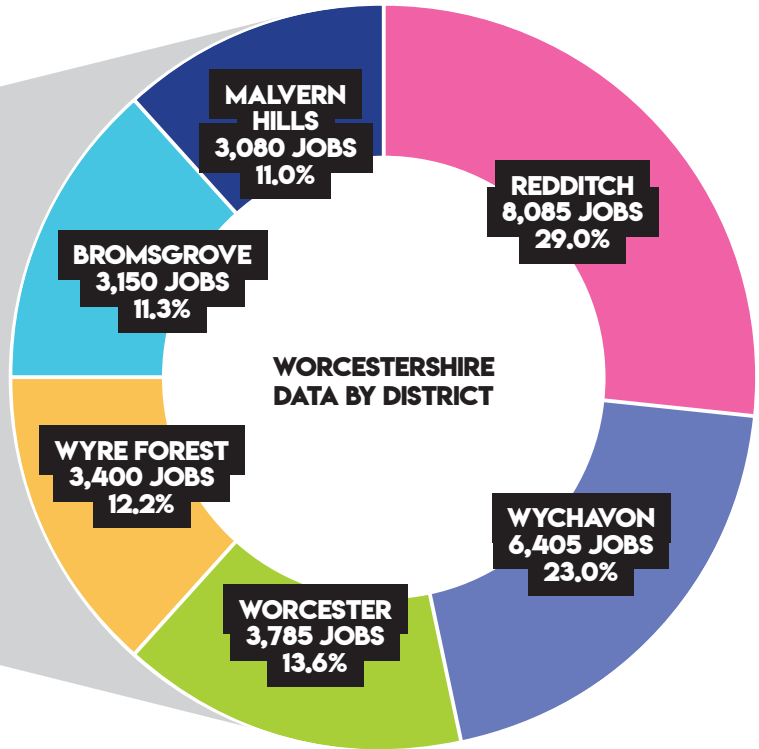
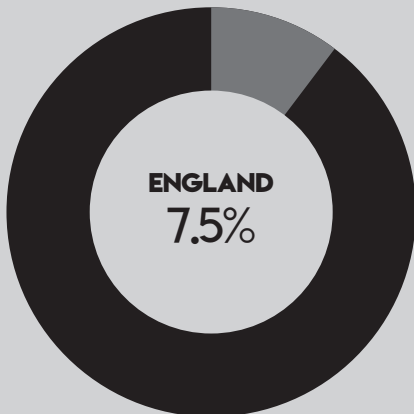
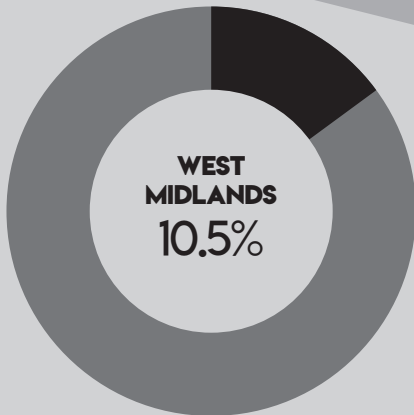
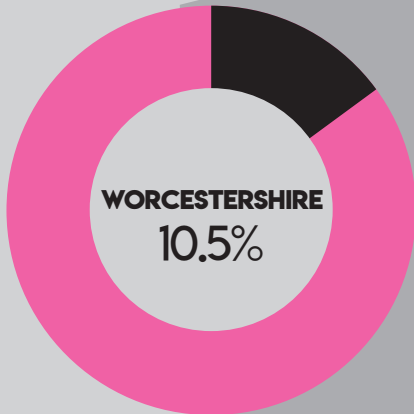


£903M GVA
GENERATED
BY TOP 50
BUSINESSES

WHAT DOES THE ADVANCED MANUFACTURING & ENGINEERING SECTOR LOOK LIKE IN WORCESTERSHIRE?

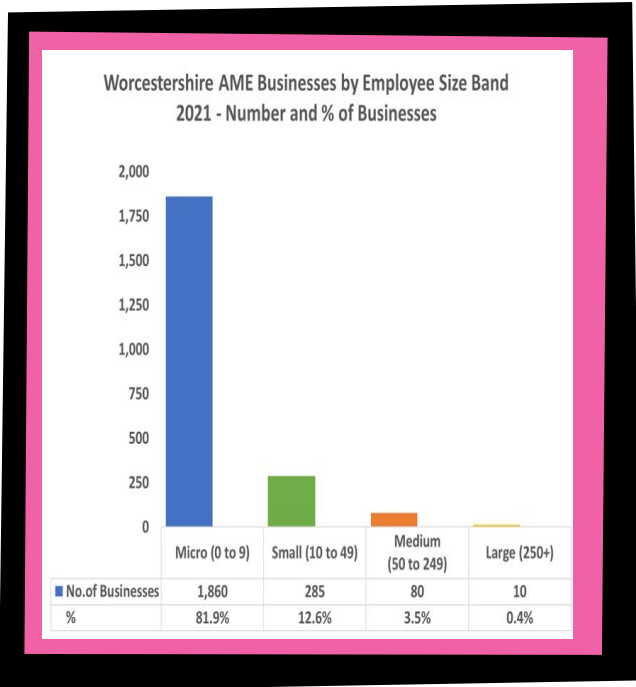
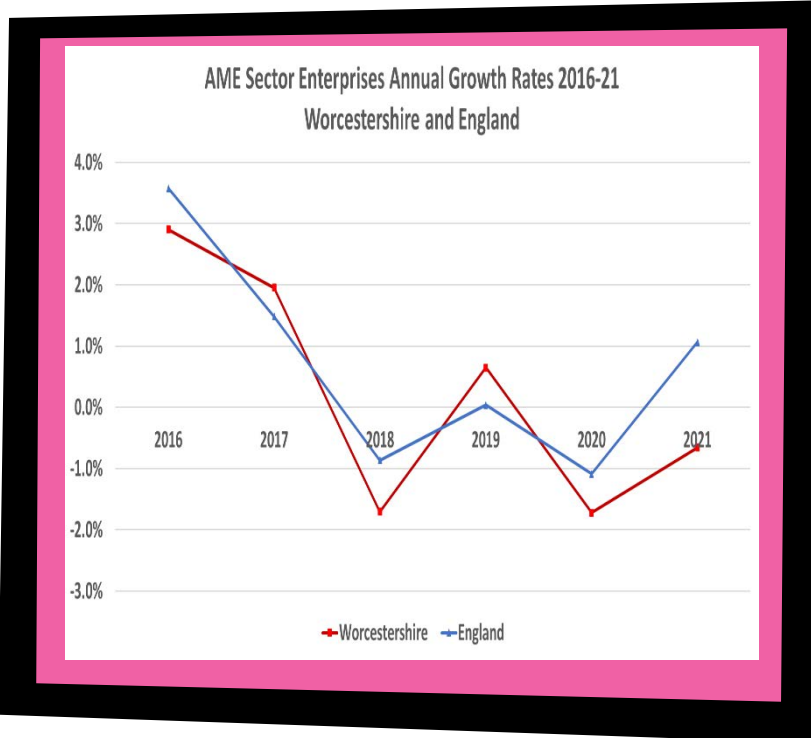
The graph below highlights the number of jobs in the AME sector in Worcestershire in comparison to both the West Midlands and England. Emphasising the importance of AME industry throughout the county and the districts which employ the most individuals into AME job roles.

AME JOBS AS A % OF TOTAL WORKFORCE



KEY FACTS:

- Currently there are 28,130 people employed in Worcestershire’s AME sector.
- Proportion of total employment in Worcestershire’s AME sector (10.5%) is significantly higher than the England average (7.5%).
- Worcestershire is 9th highest out of all LEP areas looking at AME jobs as a % of total jobs.
- Highest proportion of AME employment in Worcestershire is in Fabricated Metal Products (17.8% or 5,000 jobs) - higher than the England average (13.0%).
- Currently there are 2,270 businesses in Worcestershire’s AME sector. The AME sector accounts for 7.8% of total businesses in Worcestershire.
- Districts with the strongest growth are Wyre Forest (4.8%), Wychavon (3.9%) and Bromsgrove (2.9%).
- The top 3 AME subsectors in Worcestershire are: Engineering Activities & Related Technical Consultancy, Fabricated Metal Products and Repair & Installation of Machinery & Equipment.
- The largest proportion of Worcestershire’s AME businesses are micro businesses employing 0-9 people (81.9%). Small businesses employing 10-49 people account for 12.6% of Worcestershire AME sector.



- Medium and large businesses (those with 50+ employees) account for a combined share of 3.9% of Worcestershire AME businesses. There are currently 10 large businesses (250+ employees) within the Worcestershire AME sector.

TOP 10 WORCESTERSHIRE AME SECTOR EMPLOYERS

1.

BOSCH THERMOTECHNOLOGY LTD

Manufacture of central heating radiators and boilers

WORCESTER

2.

TITAN EUROPE LTD

Manufacture of other parts and accessories for motor vehicles

WYRE FOREST

3.

MALVERN PANALYTICAL LTD

Manufacture of electronic measuring, testing etc. equipment

MALVERN HILLS

4.

F.W THORPE PUBLIC LIMITED COMPANY

Manufacture of electric lighting equipment

REDDITCH

5.

YAMAZAKI MAZAK UK LTD

Manufacture of other machine tools

WORCESTER

6.

METTIS AEROSPACE LTD

Forging, pressing, stamping and roll-forming of metal

REDDITCH

7.

BRINTONS CARPETS LTD

Manufacture of woven and tufted carpets and rugs

WYRE FOREST

8.

SOUTHCO MANUFACTURING LTD

Manufacture of locks and hinges

WORCESTER

9.

KAITA EUROPE LTD

Manufacture of electric lighting equipment

WYCHAVON

10.

MORGON TECHNICAL CERAMICS LTD

Manufacture of other ceramic products

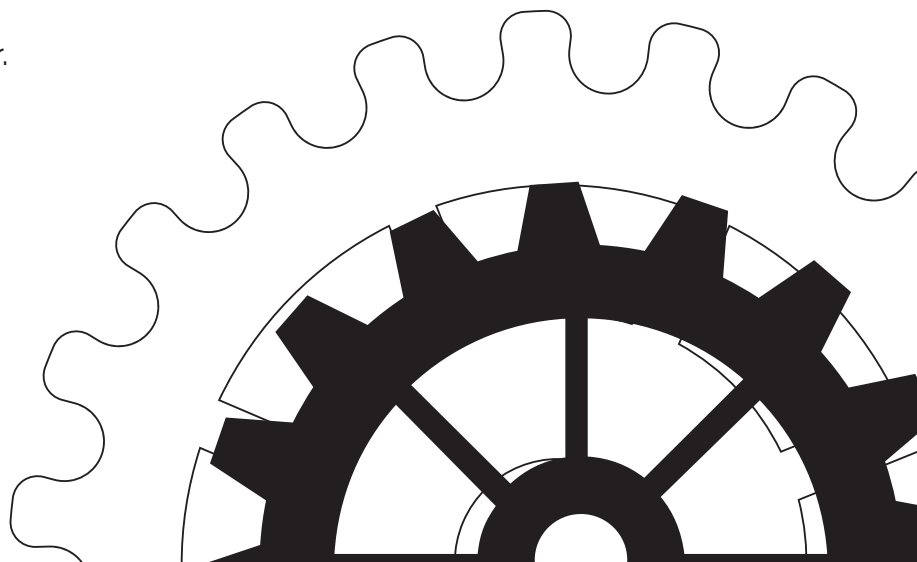
WYRE FOREST

MADE IN WORCS

- > **Bosch** - UK headquarters are based in Worcester where all the main functions of the business are located including the manufacturing of gas boilers under the leading Greenstar brand.
- > Thorlux Lighting is the trading name of **F W Thorpe** who have been designers, manufacturers and suppliers of lighting controls and systems since 1936.
- > **Sports Cars (England)** is the new name of the **Morgan** car company, world famous for its hand-built iconic British sports cars, with their unique blend of craft, heritage and pure driving experience.
- > **Harris Brush** was awarded the Royal Warrant by Her Majesty Queen Elizabeth II.
- > **Titan Steel Wheel** – part of **Titan Europe** – was awarded the Queens Award for International Trade in 2020.
- > **Forest Garden Group** is a leading supplier of timber gardening and landscaping products including sheds, fencing and garden buildings with UK sourced timber using sustainable British timber.
- > **English Braids** are manufacturers and suppliers of industrial cords and ropes specialising in the commercial and leisure marine sectors as well as industrial applications such as theatre rigging, industrial winching, vehicle recovery and window blinds.

FUTURE OPPORTUNITIES

- > **International Trade:** Worcestershire's location provides good connectivity to international trade hubs. Growth in developing countries opens up new markets as they move into being "middle income" countries.
- > **5G Enable Solutions:** Worcestershire 5G consortium have transitioned the 5G testbed into a sustainable model. This will provide Worcestershire companies to opportunities to invest in "first to market" 5G enabled solutions
- > **Engineering UK** estimates that 124,000 engineers and technicians with core engineering skills are needed every year.
- > **New digital technologies** such as autonomous robots, big data and 3D printing, are transforming the manufacturing sector and while some roles will become automated, there will still be plenty of roles for those looking to work in this sector. Across the West Midlands we can expect to see jobs growth in areas such as: next generation transport; medical technologies and pharmaceuticals; future food processing; and energy and low carbon.





SECTOR PROFILE:

BUSINESS AND PROFESSIONAL SERVICES

WHAT IS THE BUSINESS AND PROFESSIONAL SERVICE SECTOR IN WORCESTERSHIRE?

Worcestershire is home to a wide range of financial, business, and professional service firms contributing to the development and growth of Worcestershire's economy. This sector employs 37,000 people!

Areas covered in this sector include: legal services, audit, accountancy, insurance, management consultancy, recruitment, employment activities and support services.

Gross value added (GVA) is an economic productivity metric that measures the contribution of a corporate subsidiary, company, or municipality to an economy, producer, sector, or region



37,000
PEOPLE
EMPLOYED



7,760
BUSINESSES

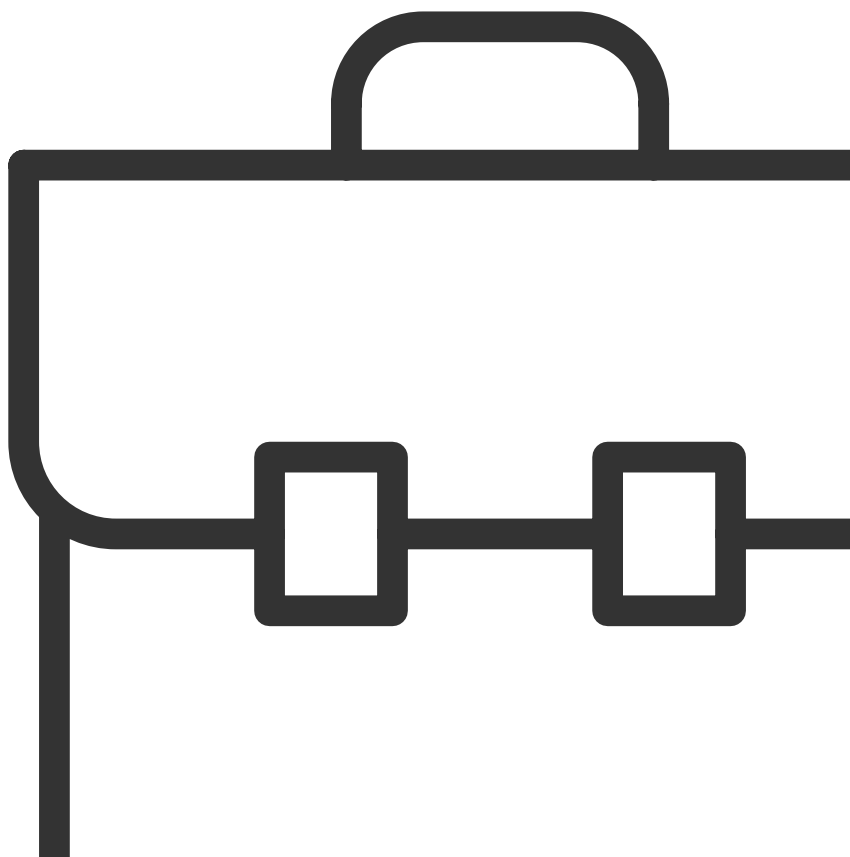
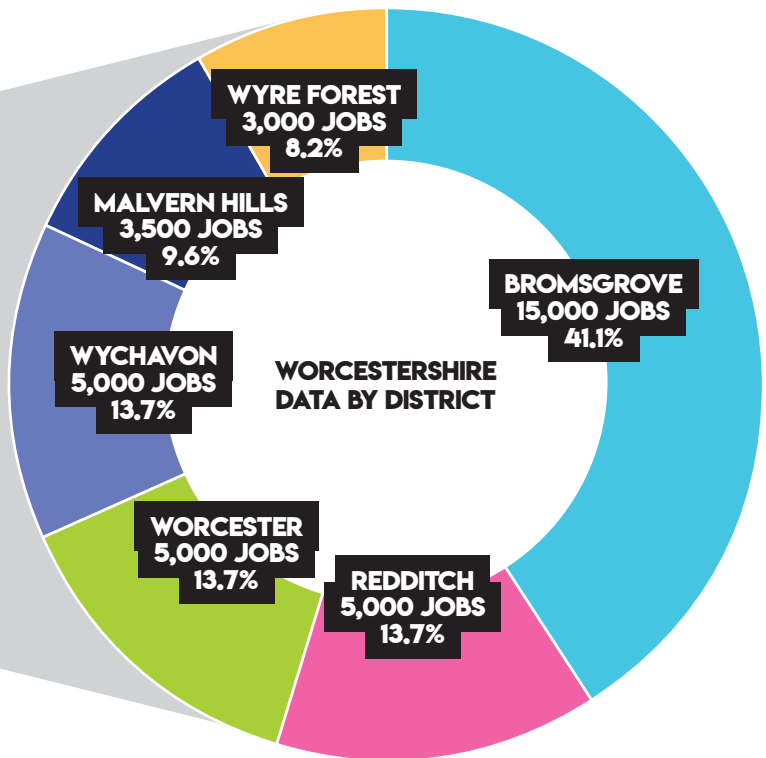
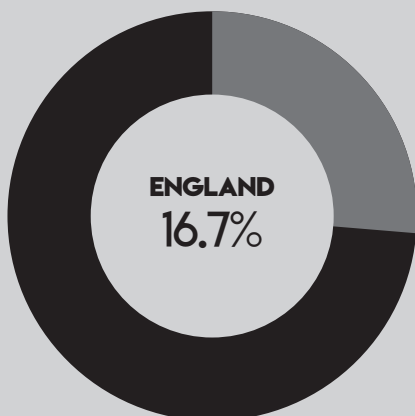
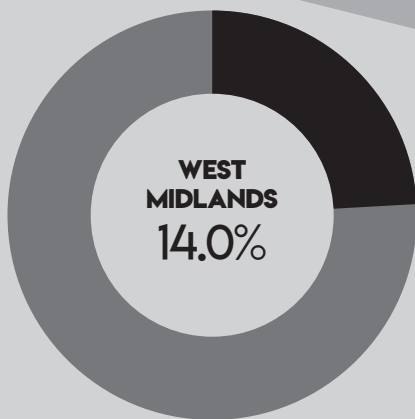
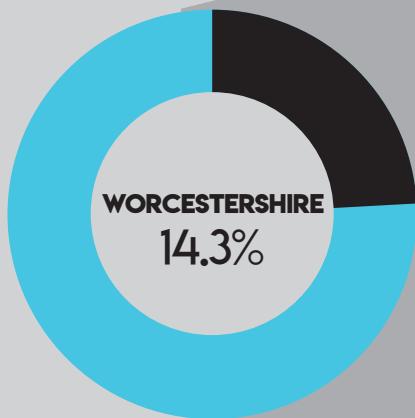


£885M GVA
GENERATED
BY TOP 50
BUSINESSES

WHAT DOES THE BUSINESS AND PROFESSIONAL SECTOR LOOK LIKE IN WORCESTERSHIRE?

The graphs below highlight the number of jobs in the business and professional sector in Worcestershire in comparison to the West Midlands and England. This highlights the importance of the business and professional industry in maintaining Worcestershire's workforce and economy.

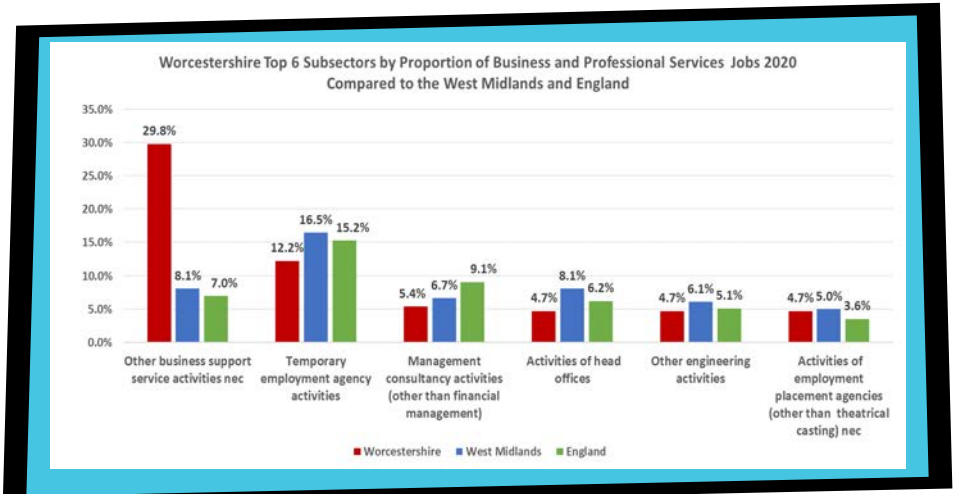
BUSINESS & PROFESSIONAL JOBS AS A % OF TOTAL WORKFORCE



KEY FACTS:

- Currently there are 37,000 people employed in Worcestershire’s Business & Professional Services sector
- The highest proportion of Business and Professional Services employment in Worcestershire is in Other Business Support Service Activities (29.8% or 11,000). This is higher than both the West Midlands and England average (8.1% and 7.0% respectively)

➤ Other subsectors (outside of the top 6) that have demonstrated growth in employment from 2019 to 2020 are: Advertising agencies (+400 jobs), Accounting and auditing activities (+250 jobs) and Engineering related scientific and technical consultancy activities (+150 jobs)

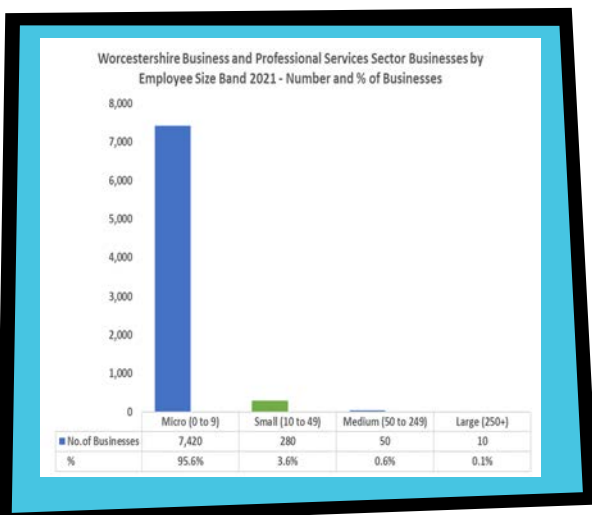


➤ Currently there are 7,760 businesses in Worcestershire’s Business & Professional Services sector

➤ The Business and Professional Services sector accounts for 26.6% of total businesses in Worcestershire compared to 24.0% for England and 21.6% for the West Midlands



➤ Worcestershire is ranked 8th of all LEP areas for Business and Professional Services businesses as % of total businesses



- The number of businesses over a 5yr period has increased from 5,430 in 2016 to 7,760 in 2021 (+2,330)
- Districts with the strongest growth are Bromsgrove (313.7%), Wyre Forest (22.4%) and Redditch (14.9%)
- The largest proportion of Worcestershire’s businesses are micro businesses employing 0-9 people (95.6%). Small businesses employing 10-49 people account for 3.6% of businesses and medium-sized businesses employing 50-249 people account for 0.6%



SECTOR PROFILE:

WORCESTERSHIRE'S CONSTRUCTION SECTOR

WHAT IS THE CONSTRUCTION SECTOR?

Worcestershire's construction sector offers significant opportunities for the development of Worcestershire's economy. The construction sector operates nationwide and employs a wide range of highly skilled workers from all regions of the UK. This sector includes a diverse range of jobs, such as: construction contracting, products manufacturing and professional services. One of the global challenges to improving the construction sector focuses upon productivity, and the performance of the infrastructure and buildings they produce.

In response, the Industrial Strategy Construction Sector deal sets out an ambitious partnership between the industry and the government that aims to transform the sector's productivity through innovative digital technologies and a more highly skilled workforce. This will be achieved by investing £250 million into the sector and reforming the Construction Industry Training Board (CITB) to become more strategic and focus on future skills needs, whilst encouraging the move to offsite manufacturing to strengthen local supply chains. Finally, they aim to establish the UK as a global leader by increasing exports of UK construction products and services, meaning it is highly likely that this sector will continue to grow and have job opportunities.



15,000
PEOPLE
EMPLOYED



3,830
BUSINESSES

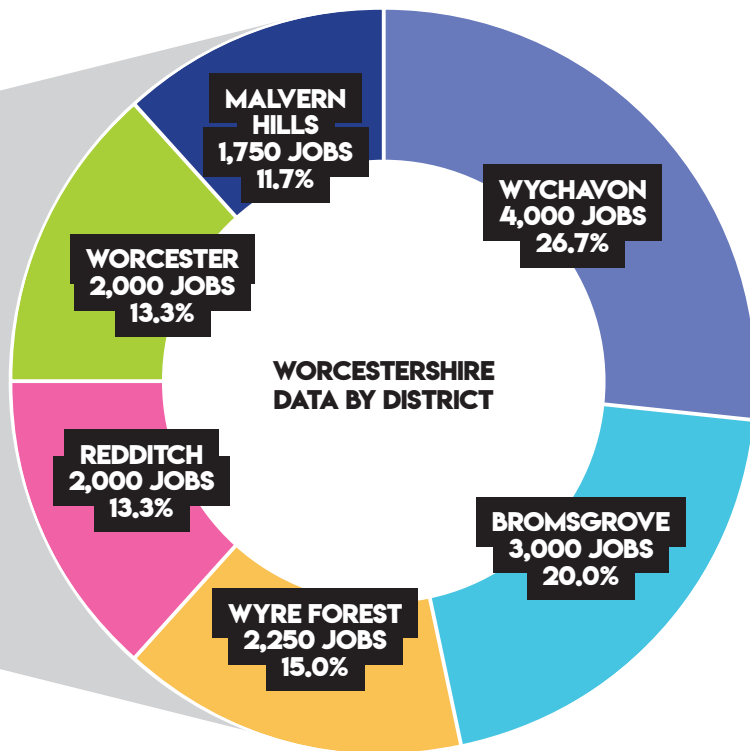
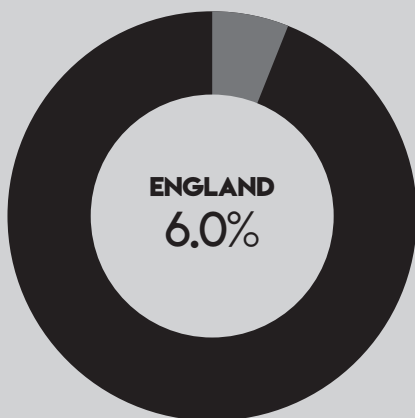
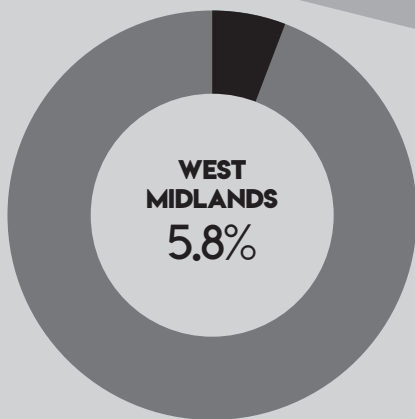
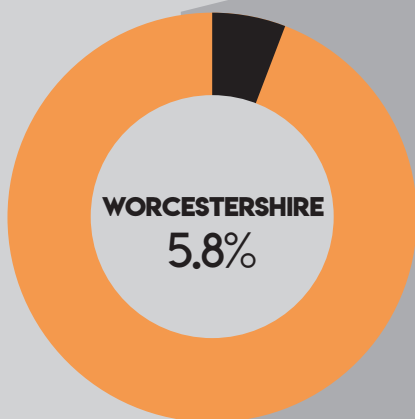


£335M GVA
GENERATED
BY TOP 50
BUSINESSES

WHAT DOES THE CONSTRUCTION SECTOR LOOK LIKE IN WORCESTERSHIRE?

The graphs below highlight the number of jobs in the construction sector across Worcestershire, in comparison to the West Midlands and England. The table also highlights the importance of the construction industry in providing employment for Worcestershire residents, and the distributions of these roles by individual districts to show which areas employ the most individuals into Construction job roles.

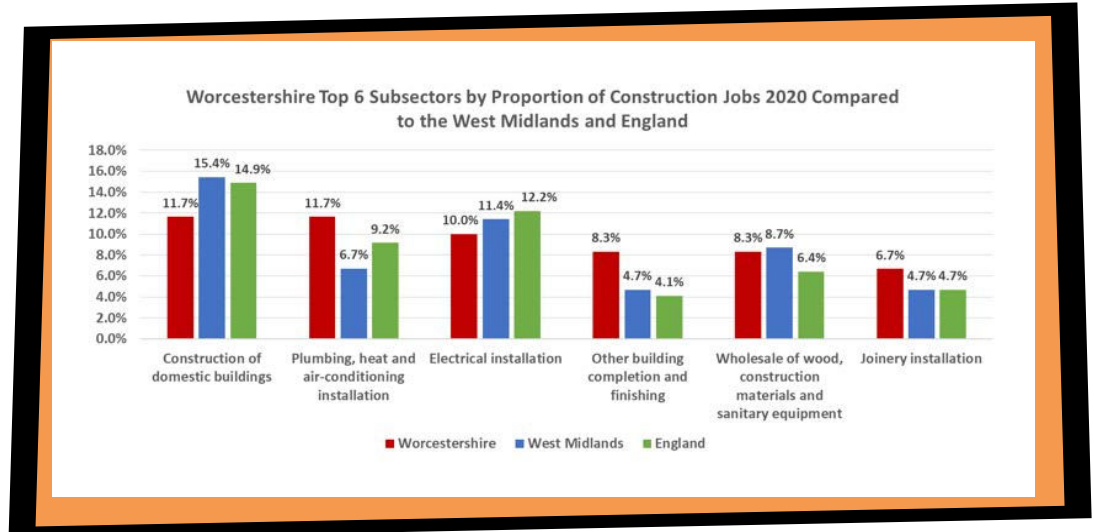
CONSTRUCTION JOBS AS A % OF TOTAL WORKFORCE



KEY FACTS:

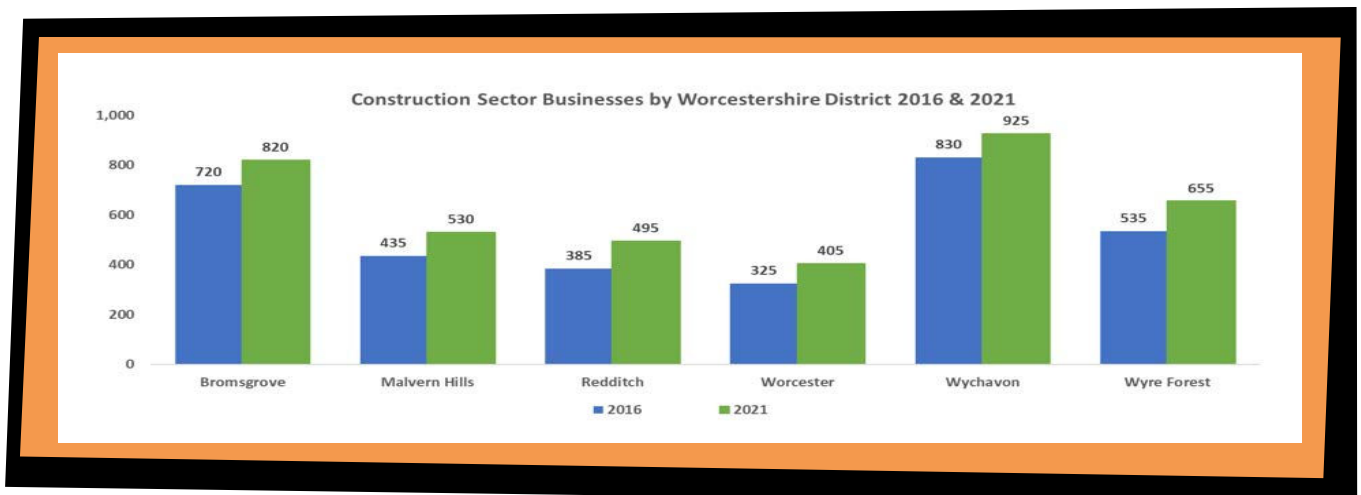
> Currently there are **3,830** businesses and **15,000** people employed in Worcestershire's Construction sector.

> The highest proportion of Construction employment in Worcestershire is in construction of **domestic buildings and plumbing, heat & air conditioning installation** subsectors, both with 11.7%.



> Whilst the proportion of jobs for construction of domestic buildings is lower for Worcestershire than both the regional and England average, the proportion for plumbing, heat & air conditioning installation jobs is **higher for Worcestershire than for both the West Midlands and England**.

> Construction accounts for **13.1% of total businesses in Worcestershire** compared to 14.1% for England and 13.3% for the West Midlands



> Districts with the strongest growth in enterprise numbers from 2016 to 2021 are Redditch (28.6%), Worcester (24.6%) and Wyre Forest (22.2%)

> The top 3 Construction subsectors in Worcestershire are: **Electrical installation, Development of building projects and Plumbing, heating and air-conditioning installation**.

> The largest proportion of Worcestershire's businesses are **micro businesses employing 0-9 people (94.6%)**. Small businesses employing 10-49 people account for 4.8% of businesses, medium-sized businesses employing 50-249 people account for 0.4%, whilst large businesses employing 250+ people account for just 0.1%

TOP 10 WORCESTERSHIRE CONSTRUCTION SECTOR EMPLOYERS

1.

GRAFTON MERCHANTING GB LIMITED

Agents involved in the sale of timber and building materials

BROMSGROVE

2.

HEALY'S CIVIL ENGINEERING LTD

Construction of other civil engineering projects

REDDITCH

3.

LIONCOURT HOMES LIMITED

Development of building projects

WORCESTER

4.

COMPCO FIRE SYSTEMS LIMITED

Other construction installation

WORCESTER

5.

SPELLER METCALFE LIMITED

Development of building projects

MALVERN HILLS

6.

G T ACCESS LIMITED

Renting and leasing of construction and civil engineering machinery and equipment

BROMSGROVE

7.

JET PLANT HIRE LIMITED

Other specialised construction activities

WYCHAVON

8.

WHITING LANDSCAPE LIMITED

Other specialised construction activities

BROMSGROVE

9.

BARRIE BEARD LIMITED

Electrical installation

WYCHAVON

10.

PLACE PARTNERSHIP LIMITED

Development of building projects

WORCESTER

MADE IN WORCS

- > **Grafton Merchanting GB Limited** is the UK merchanting division of **Grafton Group plc** based in the Republic of Ireland. Trading as Buildbase, Electricbase, Frontline Bathrooms, Selco Builders Warehouse and several other UK based divisions, the company is one of the 3 largest builders' merchant organisations in the UK with turnover of £933m in 2019.
- > **Speller Metcalfe** has their headquarters in Malvern and are a multi-sector construction specialist serving sectors including commercial & industrial, education, healthcare, heritage, retail, and sports & leisure. The Living division also services the residential market including the affordable homes, apartments & student accommodation, extra care & over 55s and private homes sectors.
- > Worcestershire is home to a number of construction companies specializing in new housebuilding including **Lioncourt Homes**,

Beech Grove Homes Limited (a division of **Sanctuary Housing Group**) and **B S Inc Limited**.

- > Groundworks and civil engineering feature prominently in the top 50 Worcestershire construction businesses, such as **Healy's Civil Engineering Limited, Hannafin Holdings Limited, R M Contractors, Montel Civil Engineering** and **West Point Construction**.
- > Several specialist Worcestershire plant and access hire companies compete successfully in a market dominated by larger national organisations, without which the construction sector would struggle to cope. These include **G T Access Hire Limited, Jet Plant Hire Limited, Ladybird Crane Hire Limited** and **Platform Hire Limited**.

FUTURE OPPORTUNITIES

- > The latest **Construction Skills Network (CSN) Report 2021-2025** forecasts that construction output in the West Midlands will grow by an annual average of 4.8% to 2025. This compares with forecasts of 4.4% for England and 4.3% for the UK. Key drivers for growth will be private sector housing and infrastructure (particularly HS2).
- > The Government's "**Build Back Better**" puts forward plans for investment in infrastructure and skills as well as the levelling up initiative which should provide impetus for construction in future years.



- > **Digital technologies** and **Modern Methods of Construction (MMC)** have the potential to transform construction products and processes such as 3D printed components, whilst offsite manufacturing of construction components such as roofs and bathroom pods have produced cost savings for materials.
- > In addition, adoption of the **Building Information Modelling (BIM)** framework and systems should benefit the whole construction process from initial design to operation and maintenance of completed buildings.
- > Estimates by the **Construction Skills Network (CSN)** show an Annual Recruitment Requirement (ARR) of 5,000 construction workers for the West Midlands region between 2021 and 2025.



SECTOR PROFILE:

CYBER, IT AND DEFENCE SECTOR

WHAT IS THE CYBER, IT AND DEFENCE SECTOR IN WORCESTERSHIRE?

The Cyber, IT and Defence sector is one of Worcestershire's priority sectors and is key to the future growth of Worcestershire's economy. The Midlands Cyber Cluster (located in Malvern,) is the regional Cyber Security Cluster for the West Midlands with responsibility for championing investment and networking within the sector.

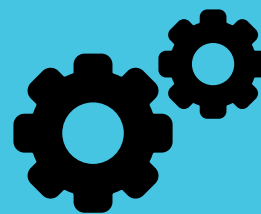
Worcestershire was also the location for one of six Government backed 5G testbeds set up to explore the use of 5G technology with a particular focus manufacturing usage. The county even hosted the first UK 5G smart factory trials.

Software development and process automation continue to play a leading role, with the county being home to specialists in sectors including financial systems, communications, safety critical and embedded systems. Worcestershire is also a significant location for specialist defence systems manufacturing, testing and consultancy.

Gross value added (GVA) is an economic productivity metric that measures the contribution of a corporate subsidiary, company, or municipality to an economy, producer, sector, or region



19,000
PEOPLE
EMPLOYED



4,440
BUSINESSES

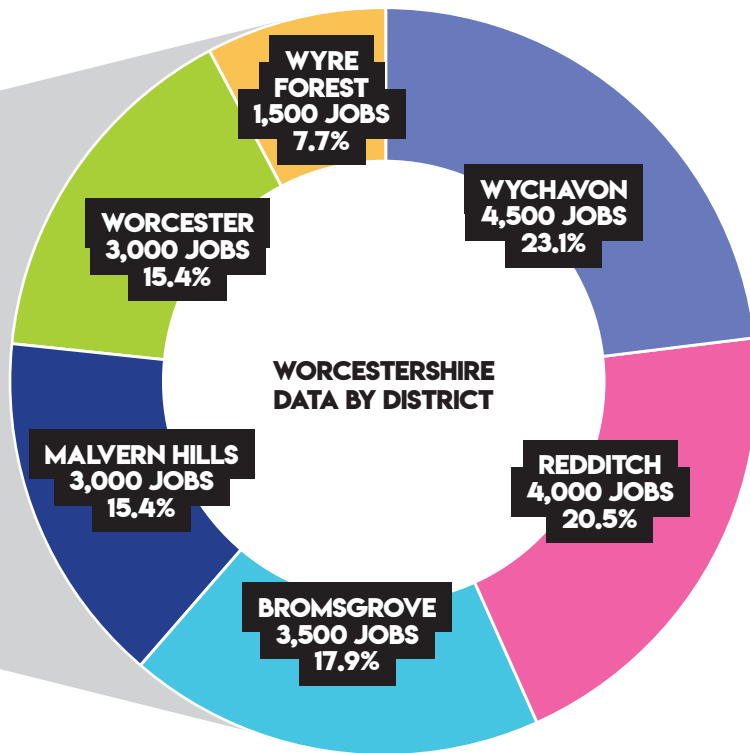
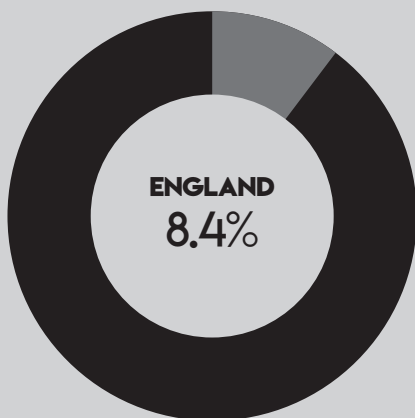
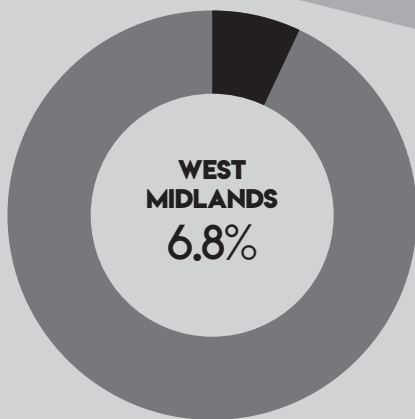
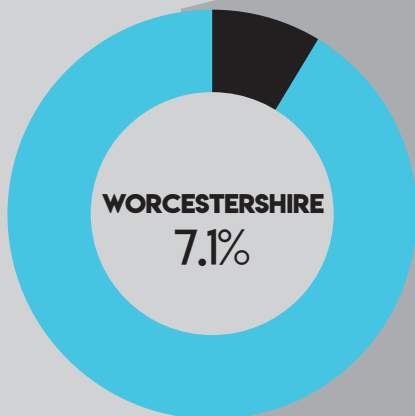


£771M GVA
GENERATED
BY TOP 40
BUSINESSES

WHAT DOES THE CYBER, IT AND DEFENCE SECTOR LOOK LIKE IN WORCESTERSHIRE?

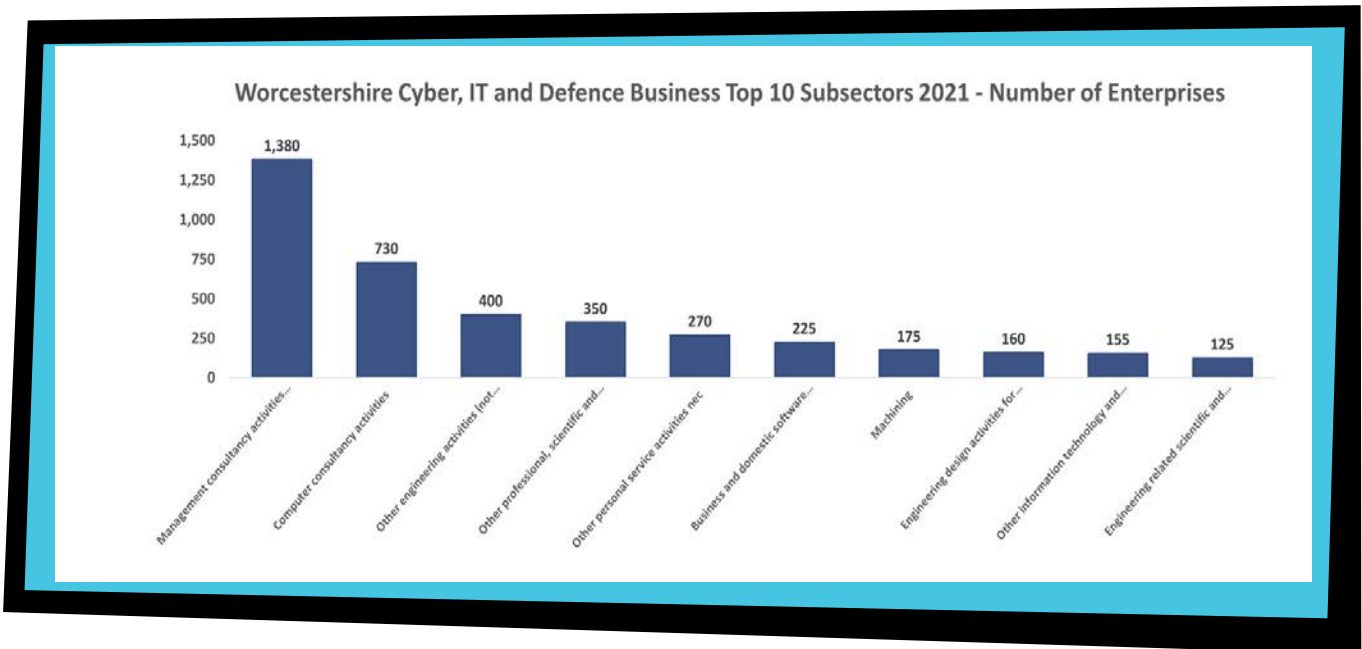
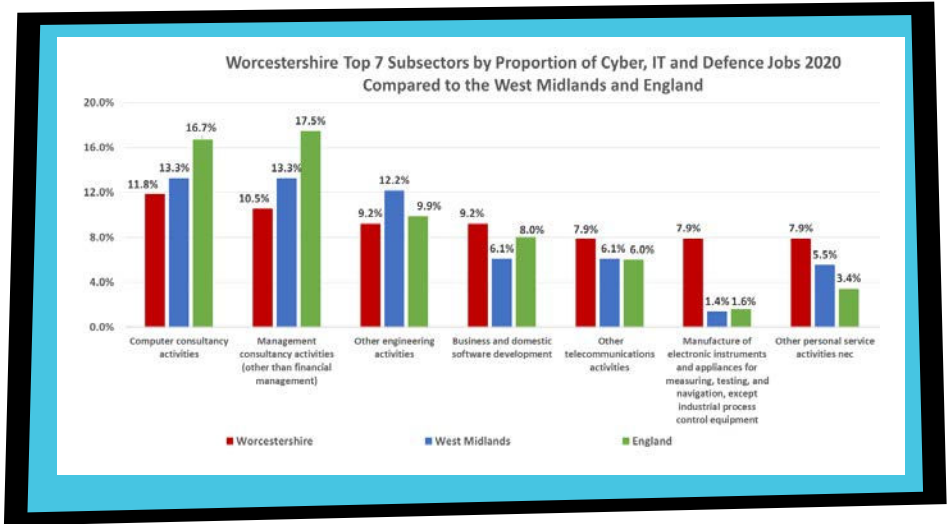
The graph below highlights the number (percentage) of jobs in comparison to the West Midlands and England. The table also highlights the importance of the Cyber, IT and Defence industry throughout the district, and the distribution of individual job roles to find out which district employs the most individuals within the industry.

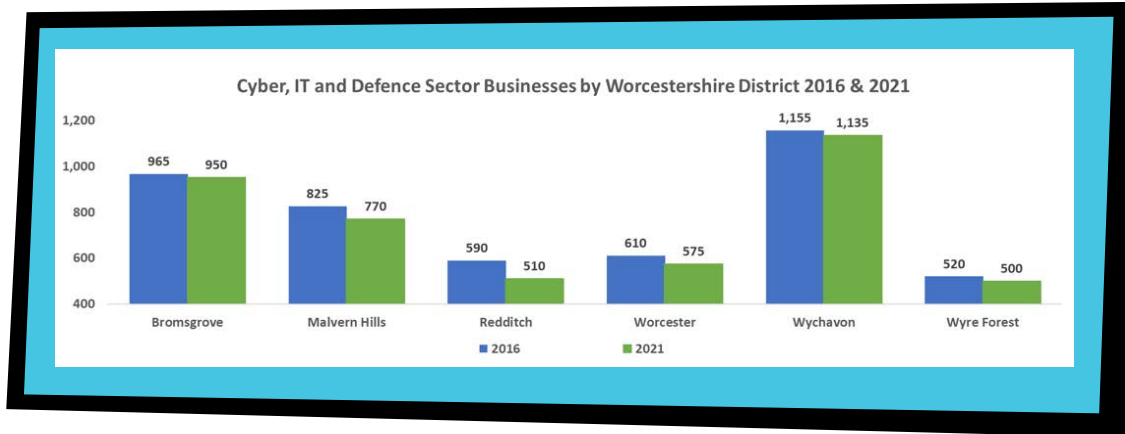
CYBER, IT AND DEFENCE JOBS AS A % OF TOTAL WORKFORCE



KEY FACTS:

- Currently there are 19,000 people employed in Worcestershire’s Cyber, IT and Defence sector and 4,400 businesses within the industry.
- Employment has increased by 1,000 jobs (+5.6%) between 2019 and 2020.
- The highest proportion of Cyber, IT and defence employment in Worcestershire is in the computer consultancy activities and management consultancy (other than finance) subsectors, with 11.8% and 10.5% respectively.
- Two of the top 7 sub-sectors have grown in employment from 2019 to 2020:
 - Other personal services activities (+500 jobs)
 - Manufacture of electronic instruments & appliances for measuring, testing and navigation (+250 jobs)
- The top 3 Cyber, IT and Defence subsectors in Worcestershire are: Management consultancy activities, Computer consultancy activities and Other engineering activities.





- Districts with the strongest growth between 2015 and 2021 are Bromsgrove (6.1%) and Worcester (1.8%).
- The largest proportion of Worcestershire's Cyber, IT and Defence businesses are micro businesses employing 0-9 people (93.6%).



TOP 10 WORCESTERSHIRE CYBER, IT AND DEFENCE SECTOR EMPLOYERS

1.

QINETIQ LIMITED

Engineering related scientific and technical consulting activities

2.

OPEN G I

Limited Business and domestic software development

3.

AT&T ISTEEL

Other telecommunications activities

4.

SOUTHCO MANUFACTURING LIMITED

Manufacture of locks and hinges

5.

VERSION 1 SOLUTIONS LIMITED

Information technology consultancy activities

6.

METTIS AEROSPACE LIMITED

Forging, pressing, stamping and roll-forming of metal; powder metallurgy

7

MORGAN TECHNICAL CERAMICS LIMITED

Manufacture of other ceramic products

8.

OGL COMPUTER SERVICES GROUP LIMITE

Other information technology service activities

9.

SWISSLOG (UK) LTD.

Other specialised construction activities n.e.c. motorcycles

10.

MORTGAGE BRAIN HOLDINGS LIMITED

Business and domestic software development

MADE IN WORCS

- **Version 1 Solutions** are a specialist provider of IT services and solutions to the public and private sectors. The company also has its own Innovation Labs which develops solutions through technologies such as artificial intelligence (AI), chatbots, blockchain, robotic process automation, augmented & virtual reality, and the Internet of Things (IoT).
- Redditch is the location for the UK division of **Swisslog**. This is a global player in logistic automation, which provides warehouse automation encompassing automated storage & retrieval systems, transport & conveyor systems, picking & palletizing as well as software solutions.
- Established in 1978 with 120+ employees, **Foster + Freeman** is a leading player in the forensic science equipment manufacturing sector. Key specialism of the business includes fingerprint evidence, light sources, document examination and trace evidence.
- QinetiQ was formed in 2001 when the MOD split the **Defence Evaluation and Research Agency (DERA)**. This company provides test and evaluation services for military & civil platforms, systems, weapons, and components for the MOD under a long-term partnering agreement, based in Malvern.
- **Airband Community Internet** is a specialist, independent internet service provider covering parts of the Midlands, South-West, North Wales, Oxfordshire, and South Wales. Airband specialises in connecting homes, businesses, and industry in rural areas to high-speed broadband technology.
- With a product range including components for landing gear, airframe, engines and emergency power systems, Redditch based **Mettis Aerospace** specialises in the aerospace and defence sectors. Additional product specialisms include propeller hubs & blades, **missile fins, transmission casing and road wheels**.

FUTURE OPPORTUNITIES

- The West Midlands has been indicated by the **DCMS** as the country's fastest growing tech sector. With average tech sector growth of 7.6% per annum between 2014 and 2019, the region has the potential to create and extra 52,000 tech jobs and add £2.7bn to the economy by 2025.
- Hard to reach homes and businesses in Worcestershire will benefit from the national **£5bn Project Gigabit** which will extend the reach of gigabit broadband services from November 2022.
- The cyber security sector continues to provide opportunities for growth both within Worcestershire and the UK as well as potential for increasing exports. Data for 2019 shows that UK cyber security exports were valued at £3.9bn (2018: £2.1bn), taking a leading share (55%) of total UK security exports.
- In addition, the undergraduate **CyberFirst** Bursary programme continues to attract students seeking future careers in the cyber security sector.
- The challenge for Worcestershire is to continue to attract, retain and grow evolving tech-based businesses through programmes and initiatives such as the **BetaDen Accelerator**, the **5G Testbed** and the expansion of the **Malvern Hills Science Park**.



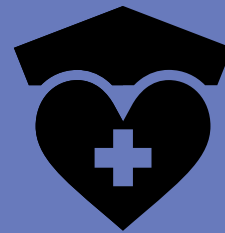
SECTOR PROFILE:

WORCESTERSHIRE'S HEALTH AND CARE SECTOR

WHAT IS THE HEALTH AND CARE SECTOR IN WORCESTERSHIRE?

The Health and Care sector in Worcestershire brings together public and private sector organisations, employing 38,000 people and providing essential services. Worcestershire is home to 2 NHS Trusts which cover 3 acute hospitals in Worcester, Redditch, and Kidderminster and 7 community hospitals/rehabilitation units across the county.

The sector has always been adaptive, supporting the needs of all age groups within the population and responsive to innovation, the development of medicines and disease prevention initiatives. However, the COVID-19 pandemic has illustrated the potential for technology-based innovations – from track and trace apps to online consultations – and the speed at which innovation in this sector is now moving forward. This is one of Worcestershire's emerging sectors, offering significant opportunities for the future growth of the county's economy including segments such as instrumentation, devices & equipment manufacture, research & development, healthcare services and assistive technology & diagnostics.



38,000
PEOPLE
EMPLOYED



1,000
BUSINESSES

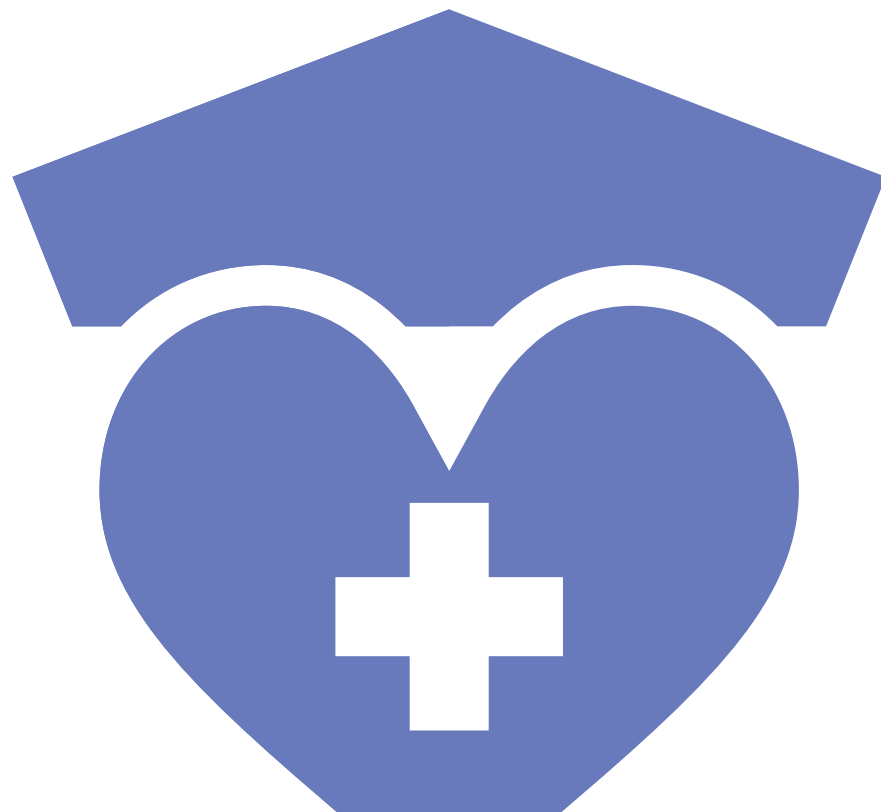
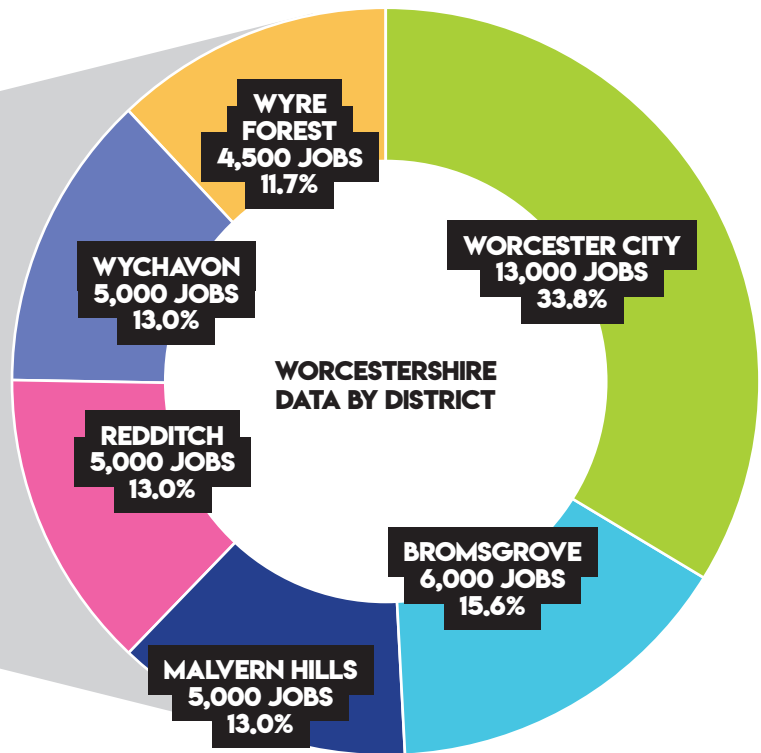
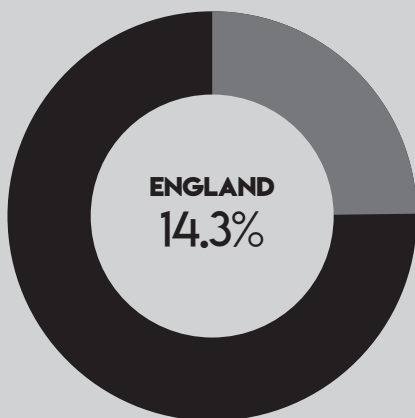
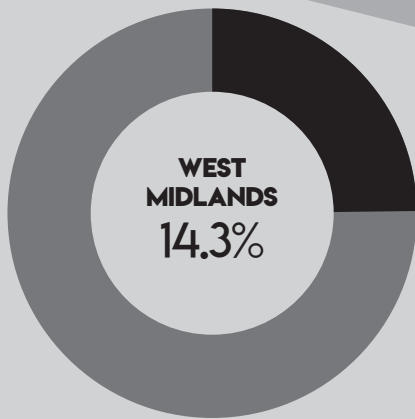
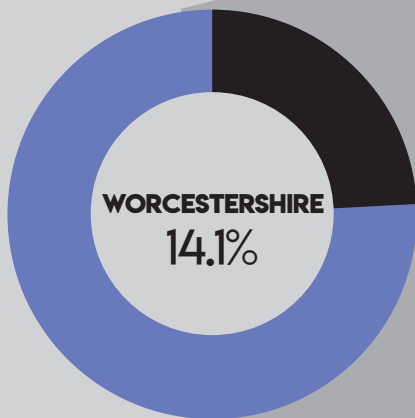


£475M GVA
GENERATED
BY TOP 50
BUSINESSES

WHAT DOES THE HEALTH AND CARE SECTOR LOOK LIKE IN WORCESTERSHIRE?

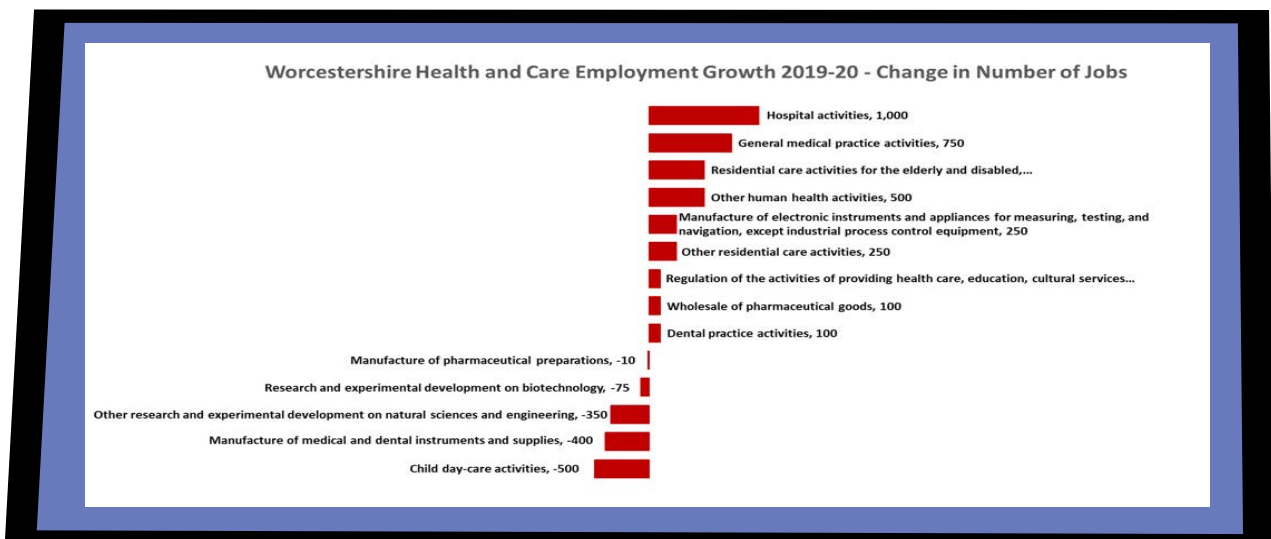
This graph highlights the number of jobs in the Health and Care sector in comparison to both the West Midlands and England. This also highlights the distribution of jobs in the individual districts of Worcestershire County to determine which areas currently have the most jobs available and are likely to see the most growth in the future.

HEALTH AND CARE JOBS AS A % OF TOTAL WORKFORCE

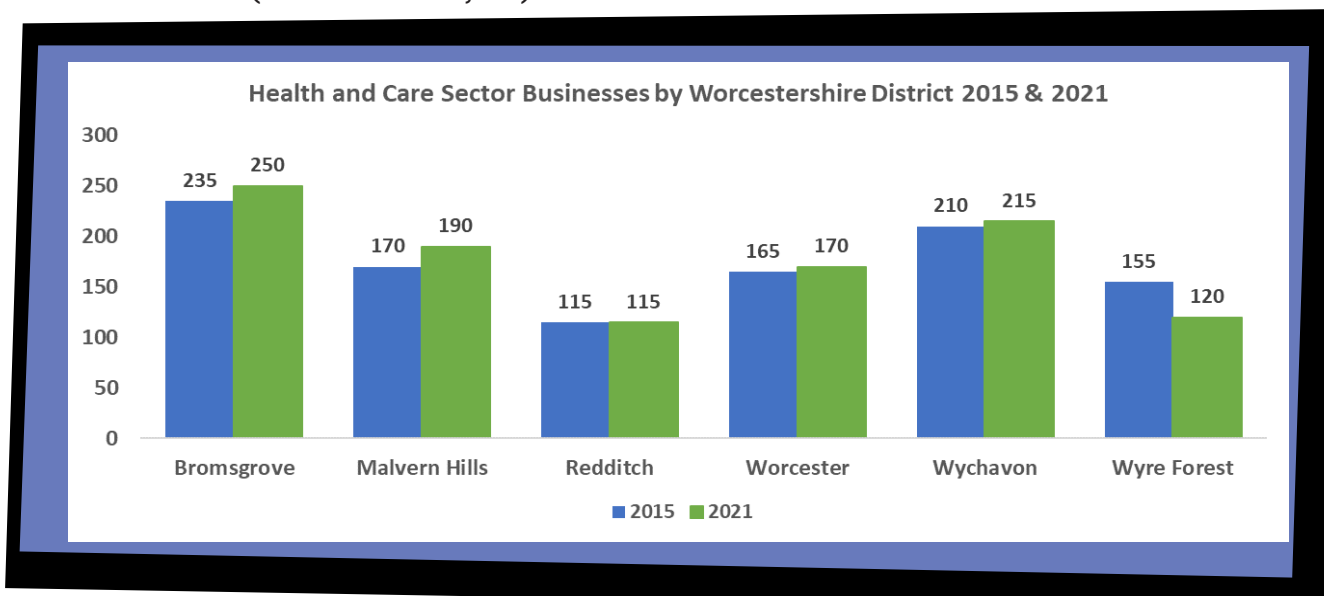


KEY FACTS:

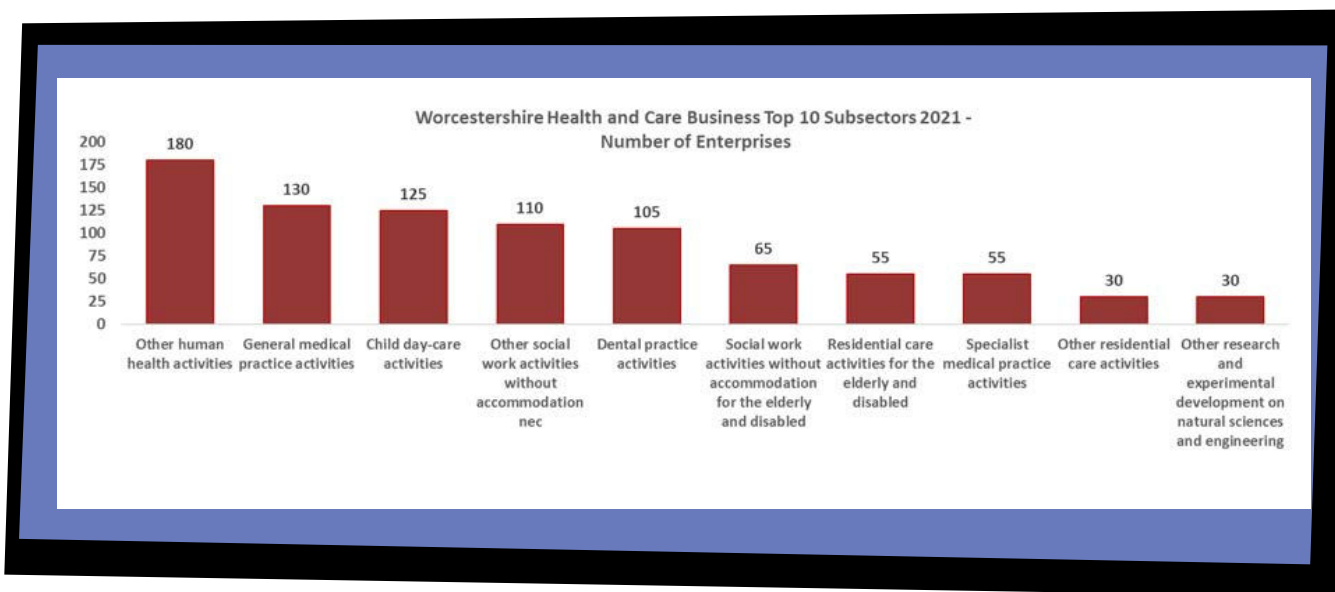
- > Currently there are 38,000 people employed in Worcestershire's Health and Care sector
- > Employment in Worcestershire's Health and Care sector as a proportion of total employment (14.1%) is slightly lower than the England average and the West Midlands (both with 14.3%)
- > The proportion of people employed in the manufacture of electronic instruments and appliances for measuring and testing is significantly higher in Worcestershire (3.9%) than the England average (0.9%)
- > Four of the top 7 Health and Care subsectors have grown in employment from 2019-20:
 - > Hospital activities (+1,000 jobs)
 - > General medical practice activities (+750 jobs)



- > Residential activities for the elderly and disabled and Other human health activities (both with +500 jobs)



- > Currently there are 1,000 businesses in Worcestershire's Health and Care sector
- > From 2020-2021 there has been an increase in the number of businesses (+55 businesses)
- > Worcestershire's rate of increase (+5.5%) compares to a +2.0% increase for the England average and a +1.7% increase for the West Midlands region
- > The top 3 Health and Care subsectors in Worcestershire are: Other human health activities, General medical practice activities and Child day-care activities



TOP 10 WORCESTERSHIRE HEALTH AND CARE SECTOR EMPLOYERS

1.

SANCTUARY CARE LIMITED

Residential care activities for the elderly and disabled

WORCESTER

2.

NUTRIUS TOPCO LIMITED

Activities of other holding companies

BROMSGROVE

3.

MALVERN PANALYTICAL LIMITED

Manufacture of electronic measuring, testing etc. equipment, not for industrial process control

MALVERN HILLS

4.

LARCHWOOD HOLDCO LIMITED

Residential care activities for the elderly and disabled

BROMSGROVE

5.

LEXON UK HOLDINGS LIMITED

Wholesale of pharmaceutical goods

REDDITCH

6.

WORCESTERSHIRE CHILDREN FIRST

Other transportation support activities

WORCESTER

7.

ACORNS CHILDREN'S HOSPICE TRUST

Child day-care activities

BROMSGROVE

8.

KIMAL HOLDINGS LIMITED

Manufacture of medical and dental instruments and supplies

WYCHAVON

9.

ST. CLOUD CARE LIMITED

Residential nursing care facilities

MALVERN HILLS

10.

VISIONS LABS LIMITED

Retail sales by opticians

WYRE FOREST

MADE IN WORCS

- > **Sanctuary Care Limited** is a leading player in the UK residential and nursing homes sector and is a division of Sanctuary Housing Association, whose headquarters are in Worcester. With turnover of £135m, Sanctuary Care has over 100 homes nationwide with 9 located within Worcestershire.
- > **Kimal Holdings** is a manufacturer and supplier of specialized procedure packs and vascular access devices to hospitals and medical facilities globally. From the first cardiology procedure pack in the 1990's, the company now manufactures over 1 million procedure packs annually and its **Vastec** research and development team continues to invest in future product developments at the company's innovation centre in Bromsgrove.
- > Worcestershire is served by 4 hospice organisations: **Acorns Children's Hospice, St Richards Hospice, The Primrose Hospice and Kemp Hospice**. These charitable organisations are reliant on fundraising and donations to enable them to provide care, treatment and therapies and end of life care.
- > Starting from a small company in the 1980's, **AKW Medicare** is a leading supplier and manufacturer of accessible bathroom, kitchen, and daily independent living products. The company works closely with occupational therapists, the care homes sector and Housing Associations to develop products to help customers continue to experience independent living.
- > Located in Malvern, **Smartbox Assistive Technology Limited** is developer and supplier of hardware and software assistive technology solutions to aid communication and independent living for those with communication, mobility, and disability issues. The company recorded turnover of £10.3m in the year to December 2019.

FUTURE OPPORTUNITIES

- > The growth of the Internet of Things (IOT) and increasingly connected systems alongside the enabling of the **5G ecosystem** in the county and good internet connections could result in increased uptake of Assisted Living Technologies to give people increased independence in later life.
- > **Artificial Intelligence (AI)**, remote monitoring and data analytics will be key areas benefiting from such increased connectivity with devices such as blood pressure and ECG monitors increasingly designed as wearable tech.
- > The **University of Worcester** is a key asset in the health and care sector in Worcestershire offering undergraduate, postgraduate, and professional courses including clinical psychology, nursing, midwifery, paramedic science, occupational therapy, physiotherapy, and social work. The University is also a specialist research centre for dementia studies, whilst the mood disorders research group studies bipolar and other psychotic disorders. In 2022, the university will open the new **Three Counties Medical School** in Worcester.