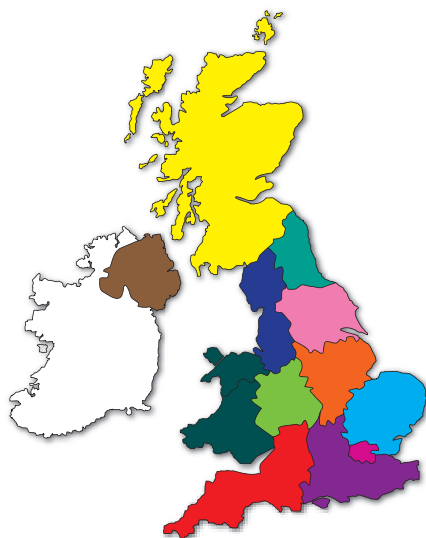


England – Yorkshire and Humber



Cogent in the Region

The Cogent Industries are strategically important to the Yorkshire and Humber Region:

- The Cogent sector represents **5%** of the region's total **turnover** and **4%** of the region's total **GVA**.
- **Advanced Engineering** and **Chemicals** are priority industries in the region as highlighted in the **Regional Economic Strategy**.
- Yorkshire and Humber accounts for **9%** of Cogent **employers** and **8%** of Cogent **employees**.
- Priorities in the region are to improve the skills of **Technician** and **Crafts** people.
- **Productivity improvement** in the region is vital to continued growth, both Humber Chemical Focus and Yorkshire Chemical Focus are involved in improving the region's workforce.

The region has a dominant cluster of Cogent industries:

Cogent sector employment within the region is dominated by the Chemicals and Polymer industries. The Chemical and Polymer industries are clustered in the Humberside area with a further cluster in North Yorkshire. Two Oil Refineries and a number of distribution terminals are also based in the region, importing and processing approximately 20 million tonnes of crude oil. Yorkshire and Humber also imports up to 20% of UK gas and therefore hosts some offshore workers. There has been a decline in employment in the Chemical Industry (around 20% between 2000 and 2004). There is considerable cross-fertilization between clusters in the region such that firms in Bioscience are often rooted in the agri-food, environmental and especially healthcare sectors.

More information on Regional and Industry Research can be found at: www.cogent-ssc.com/research

Cogent UK Sector Headlines

- **£156bn turnover**
- **£49bn GVA**
- **6.5% of UK GVA**
- **12% of UK manufacturing workforce**
- **7% of UK manufacturing enterprises**

Cogent Headline Figures

Key Economic Indicators

2006	Cogent YH	Cogent UK
Turnover	£8bn	£156bn
Cogent GVA	£2.1bn	£49bn
Cogent GVA per Employee*	£51,513	£98,394
Number of employees	41,000	500,000**
Mean weekly pay***	£505.60	£381.50

Source: Annual Business Inquiry 2005

*UK GVA per employee £31,419

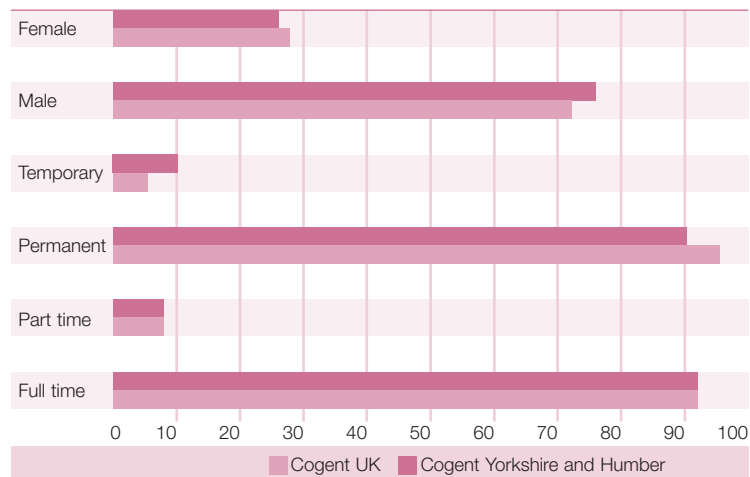
**Industry estimate of total Cogent employment 906,000

***Annual Survey of Hours and Earnings 2006

The Yorkshire and Humber industries account for:

- **5% of Cogent sector total turnover**
- **4% of Cogent sector total GVA**

Workforce Distribution



Source: Labour Force Survey Q3 2006 – Q2 2007

Cogent Workforce

Employers by Size Band

	1-10 Employees	11-49 Employees	50-199 Employees	200+ Employees	% of Total Employers	Total Employers
Cogent – Yorkshire & Humber	65%	26%	7%	2%	9%	1,700
Cogent – Great Britain	68%	23%	7%	2%	100%	18,500
Regional Economy – All Sectors	82%	14%	3%	1%	100%	70,100

Source: Annual Business Inquiry 2005

Cogent Workforce

Regional Employment by Industry

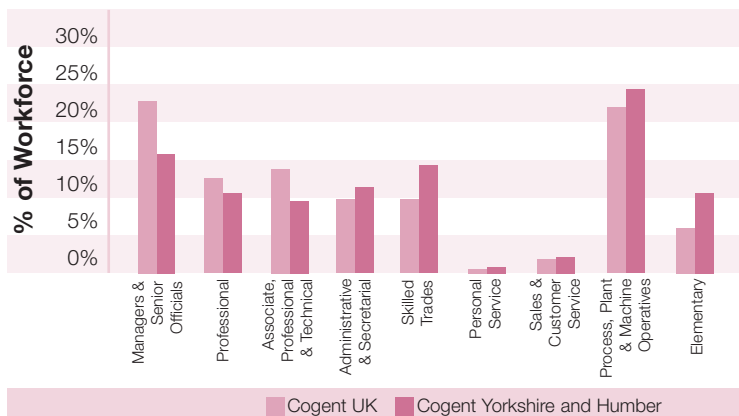
Industry Category	YH Employees	GB Total	YH% Regional of GB Total
Chemicals Manufacturing and Processing	11,700	108,300	11%
Pharmaceuticals Manufacturing	4,100	57,600	7%
Polymers Manufacturing and Processing	18,800	179,200	10%
Manufacture of Refined Petroleum Products	1,800	10,100	18%
Oil and Gas	*	28,000	*
Nuclear (inc direct supply chain)	*	49,500	*

18% of the **Petroleum** workforce is based in Yorkshire and Humber.

Yorkshire and Humber chemicals accounts for **11%** of the total industry GB workforce.

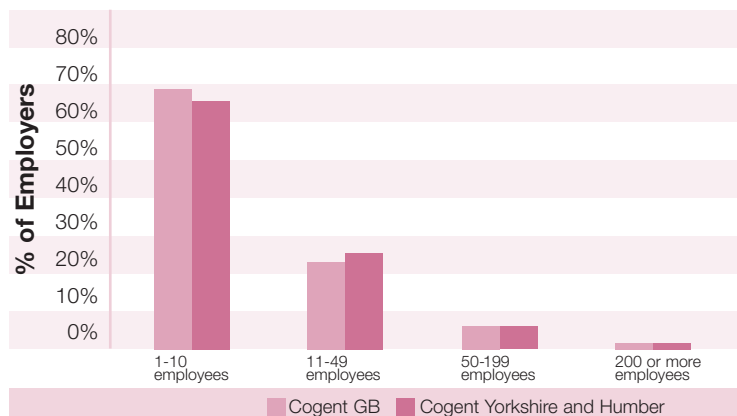
Source: Annual Business Inquiry 2005 (regional data rounded and is only Great Britain)
* Data suppressed

Occupational Distribution of the Cogent Sector in Yorkshire and Humber



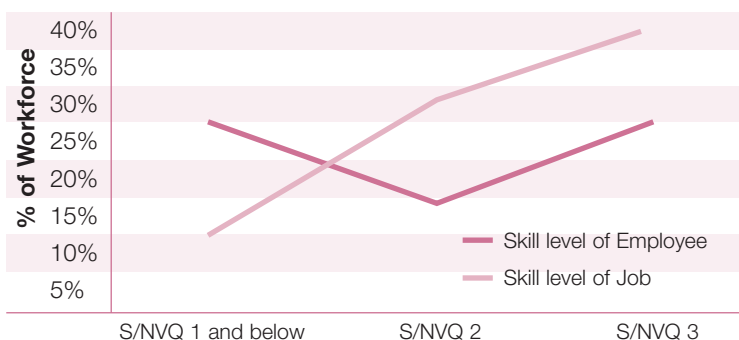
Source: Labour Force Survey Q3 2006 - Q2 2007.

Business Size of the Cogent Sector in Yorkshire and Humber



Source: Annual Business Inquiry 2005

Current Workforce: The Cogent Skills Gap



Source: Labour Force Survey Q3 2006 - Q2 2007

Key issues for the Cogent industries in the Yorkshire and Humber:

- **14% SURPLUS** of the workforce qualified to Level 1 and below
- **13% DEFICIT** of the workforce qualified to Level 2
- **11% DEFICIT** of the workforce qualified to Level 3

Cogent Sector Skills Demand¹

The proportion of vacancies reported in the Cogent sector is **higher** than the UK average by **5%**. Hard-to-fill vacancies are higher and skills shortage vacancies are lower than the UK average.

INTERNAL SKILLS GAPS are **16% higher** than the UK average.

	Cogent YH	UK
Proportion of companies reporting vacancies	23%	18%
Proportion of companies reporting 'hard-to-fill' vacancies	10%	8%
Proportion of companies reporting a skills shortage vacancy	4%	6%
Proportion of companies reporting internal skills gaps	32%	16%

Cogent Sector Training¹

The proportion of companies who have trained their staff in the previous 12 months is **12% higher** than the UK incidence of training.

¹National Employer Skills Survey 2005

Proportion of firms that have provided funding for staff training within the previous 12 months	76%	64%
Of those firms which provided training, the proportion of staff trained	37%	68%

Contact Details

office address

Cogent SSC Ltd, Unit 5,
Mandarin Court, Centre Park,
Warrington, Cheshire WA1 1GG

e-mail address

research@cogent-ssc.com

website

www.cogent-ssc.com



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