

# North West

## Cogent in the Region

- The **Chemicals, Pharmaceuticals, Nuclear, Petroleum and Polymer** industries are strategically important to the North West region and collectively represent **12% of employers** and **14% of employees** of their sectors in the UK.
- The Cogent sector workforce accounts for **18% of the regions manufacturing workforce** and **14% of manufacturing employers**.
- Cogent industries account for **32% of manufacturing GVA** and **contribute of the order of £5.2bn** to the regional economy.

### The region has a dominant cluster of Cogent industries:

Sellafield, Springfields, Capenhurst, Windscale and Calder Hall nuclear facilities are all located in the North West region as well as the Headquarters of the Nuclear Decommissioning Authority and many supply chain companies. The Shell Stanlow Petrochemical complex is situated in the Wirral with an associated storage and distribution network. The Chemical, Pharmaceutical and Polymer industries are spread across the North West. Hydrocarbons (oil, natural gas and petroleum) are produced in areas of the Irish Sea, including Morecambe and Liverpool Bays.



## Economic and Employment Update <sup>1,4,5,6</sup>

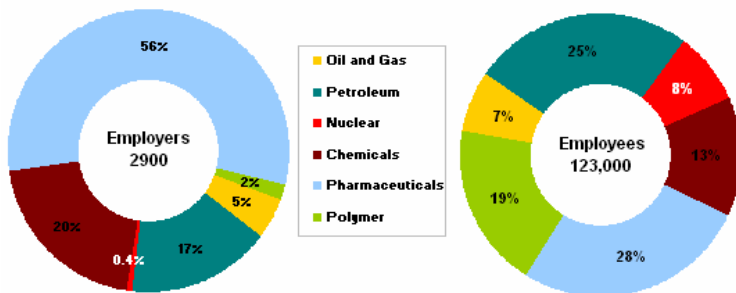
Industry	Weekly Pay-Gross <sup>4</sup>	Employers	NW % of UK Total	Employees	NW % of UK Total
	Median/£				
Oil and Gas	1,183.2	11	2%	10,400	4%
Petroleum	891.40	590	11%	16,591	11%
Nuclear	*	48	24%	23,103	40%
Chemicals	606.60	488	16%	30,973	22%
Pharmaceuticals	623.70	136	9%	8,561	12%
Polymer	432.10	1,627	13%	33,343	15%
<b>NW- Cogent</b>	<b>638.40</b>	<b>2,899</b>	<b>12%</b>	<b>122,971</b>	<b>14%</b>
<b>NW- Region</b>	<b>478.50</b>	<b>255,377</b>	<b>10%</b>	<b>3,004,076</b>	<b>11%</b>

## Cogent Industry Headlines

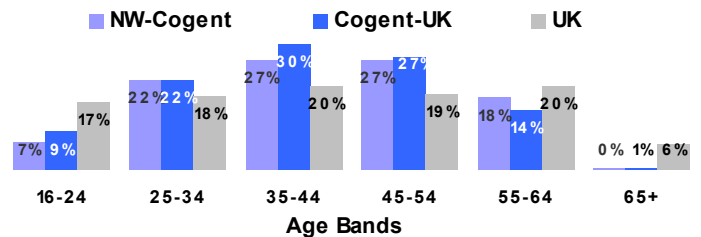
- £ 201bn Turnover
- £ 65.5bn GVA
- 7.1% of UK GVA
- 900,000 employees
- 23,000 employers
- 14% of UK manufacturing workforce
- 12% of UK manufacturing enterprises

## The Workforce

### Employers and Employees by <sup>5,6</sup>(direct and indirect)



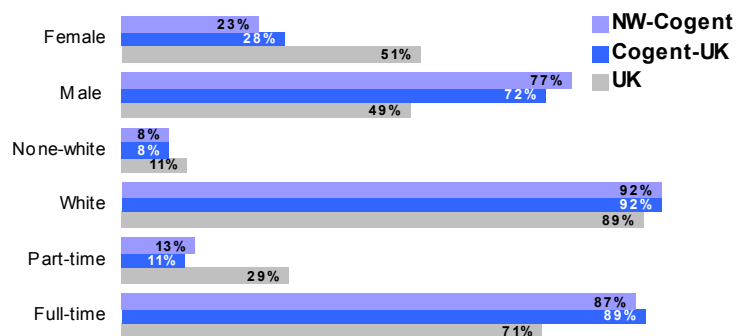
### Age Profile<sup>3</sup>



### Employers by Sizeband<sup>1</sup>

	Employees			
	1-10	11-49	50-199	200+
<b>NW-Cogent</b>	65%	23%	10%	2%
<b>Cogent-Great Britain</b>	68%	23%	7%	2%
<b>NW-Region</b>	84%	12%	3%	1%

### Workforce Distribution– Gender<sup>1</sup>, Ethnicity<sup>3</sup> and Employment Profile<sup>3</sup>



1. Annual Business Enquiry (ABI) 2008-data released June 2010, Office of National Statistics (ONS) 2010

2. National Employers Skills Survey (NESS) 2009

3. Labour Force Survey (LFS) 2009, ESDS 2010

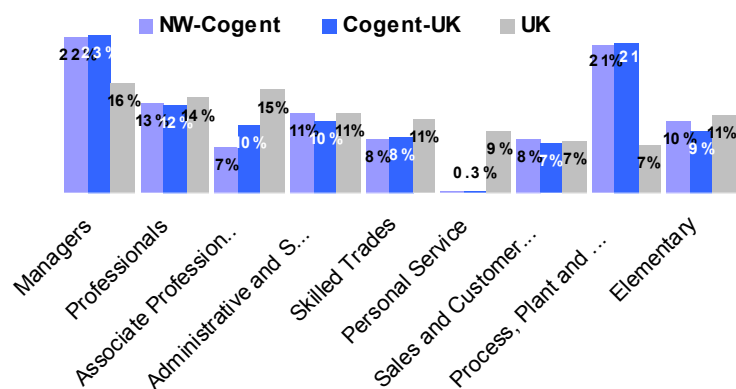
4. Annual Survey of Hours and Earnings

\* Data suppressed– ONS 2010

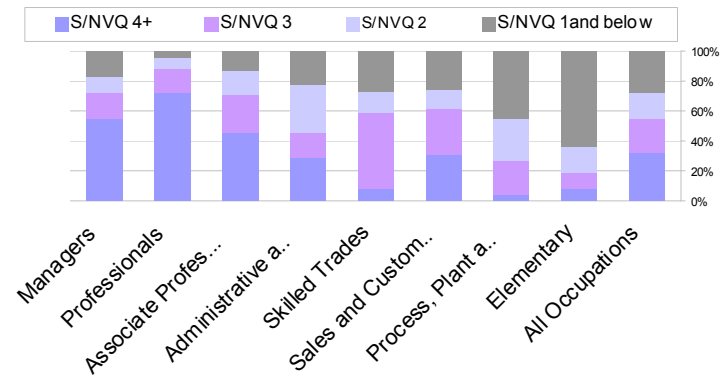
\*\* GVA - Gross value added (GVA) represents the amount that individual businesses, industries or sectors contribute to the economy.

# Occupational Distribution, Skill Level and Skills Needs

## Occupational Distribution<sup>3</sup>



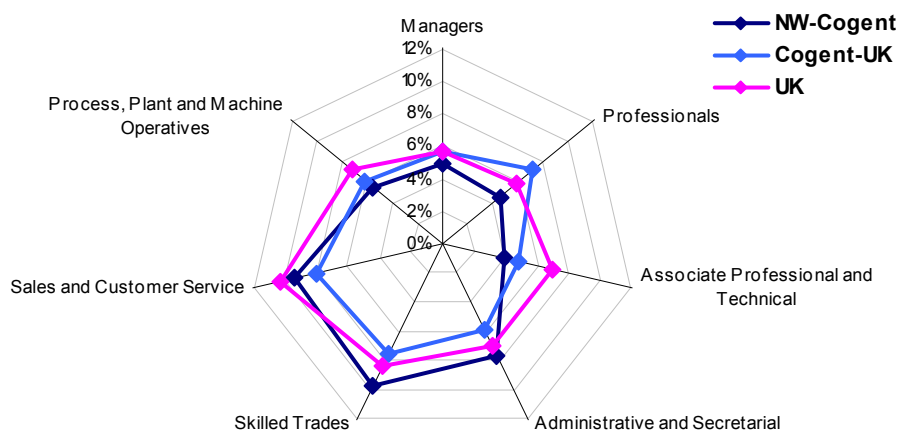
## Skill Level by Occupation<sup>3</sup>



## Skills Gaps<sup>2</sup>

	% of firms reporting skills gaps	% of staff with skills gap
Oil and Gas	47%	24%
Petroleum	24%	9%
Chemicals	21%	3%
Pharmaceuticals	12%	8%
Polymer	27%	8%
NW- Cogent	24%	7%
NW- Region	19%	7%

## Skills Gap by Occupation<sup>2</sup>



## Skills Demand and Training<sup>2</sup>

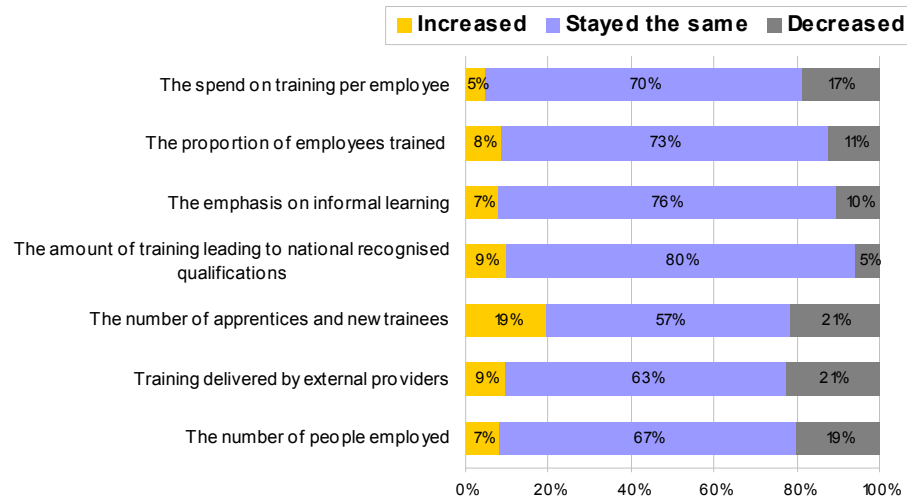
- The proportion of companies reporting vacancies fell by 6%, 'hard-to-fill' vacancies are down by 3% and skills shortage vacancies fell by 2% in 2009 from 2007.
- The proportion of employers reporting internal skills gap is higher than the national average by 5%.
- The proportion of employers providing training fell by 10% in 2009 from 2007.

	NW-Cogent		England	
	2007	2009	2007	2009
Proportion of firms reporting vacancies	15%	9%	18%	12%
Proportion of firms reporting 'hard-to-fill' vacancies	6%	3%	8%	3%
Proportion of firms reporting a skills shortage vacancy	3%	1%	6%	2%
Proportion of firms reporting internal skills gaps	22%	24%	16%	19%
Proportion of firms providing training (last 12 months)	72%	62%	67%	67%
Proportion of workforce trained (last 12 months)	62%	49%	63%	56%

## Training by Industry<sup>2</sup> (last 12 months)

	% of firms provided training	% of staff trained
Oil and Gas	100%	53%
Petroleum	55%	41%
Chemicals	72%	57%
Pharmaceuticals	78%	69%
Polymer	69%	43%
NW- Cogent	62%	49%
NW- Region	67%	55%

## Impact of Recession<sup>2</sup>



5. Cogent Industry Estimate- (estimated from national data, ABI, LFS, NESS, BIS..etc)  
 6. Power People: Civil Nuclear Workforce 2009-2025, Cogent Standard Industrial Classification (SIC 07 code), ONS 2010