

Yorkshire and Humber

Cogent in the Region

- The Cogent industries are strategically important to the Yorkshire and Humber region and collectively represent **7% of employees** and **9% of employers** in the region.
- The Cogent industries account for **14% of the manufacturing workforce** and **12% of manufacturing employers** in the region.
- Cogent industries account for **20% of manufacturing GVA** and **contribute of the order of £2.8bn** to the regional economy.

The region has a dominant cluster of Chemical and Polymer industries:

The Chemical and Polymer industries are clustered in the Humber 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.

The region imports up to 20% of the UK's gas supply. The region also supports the cross-fertilization between clusters, with bioscience companies including agriculture and food production, healthcare and environmental protection / improvement.



Economic and Employment Update ^{1,4,5,6}

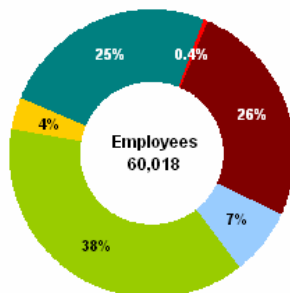
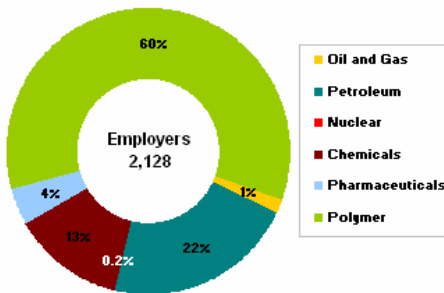
Industry	Weekly Pay-Gross ⁴	Employers	% of UK Total	Employees	% of UK Total
	Median/£	n	%	n	%
Oil and Gas	815	27	4%	2,206	1%
Petroleum	380	467	9%	14,713	10%
Nuclear	-	5	2%	264	0%
Chemicals	627	268	9%	15,374	11%
Pharmaceuticals	545	88	6%	4,436	6%
Polymer	461	1,273	10%	23,025	10%
Y&H- Cogent	566	2,128	9%	60,018	7%
Y&H- Region	364	182,437	7%	2,232,345	8%

Cogent - UK Headlines

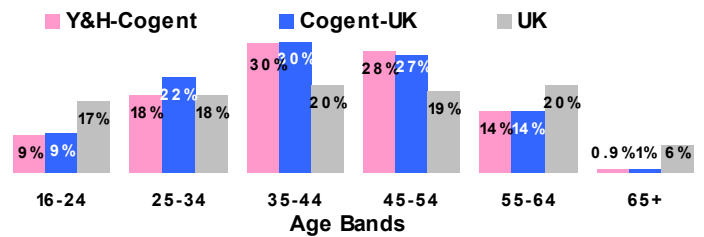
- £ 201bn Turnover
- £ 65.5bn GVA
- 7.1% of UK GVA
- 900,000 employees
- 23,000 employers
- 14% of UK manufacturing workforce
- 12% of UK manufacturing enterprises

The Workforce

Employers and Employees ^{5,6}(direct and indirect)



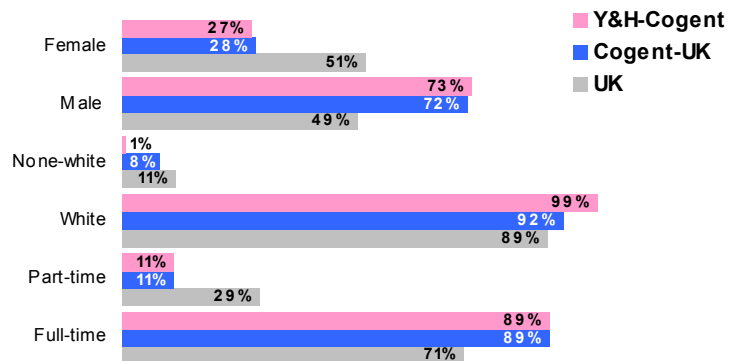
Age Profile ³



Employers by Sizeband ¹

	Employees			
	1-10	11-49	50-199	200+
Y&H-Cogent	65%	25%	8%	2%
Cogent-Great Britain	68%	23%	7%	2%
Y&H-Region	83%	13%	3%	1%

Workforce Distribution— Gender¹, Ethnicity³ and Employment Profile³



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

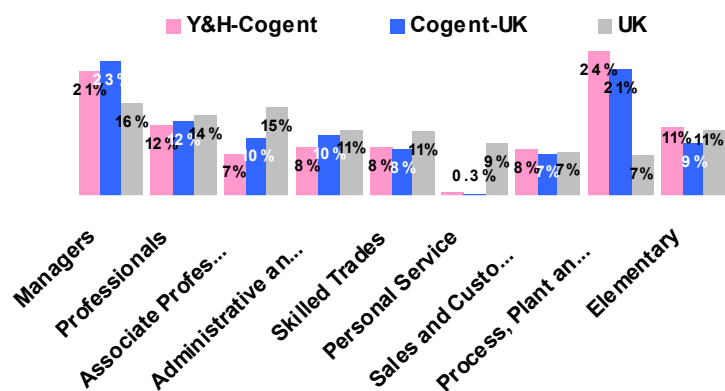
4. Annual Survey of Hours and Earnings 2009

* Data suppressed— ONS 2010

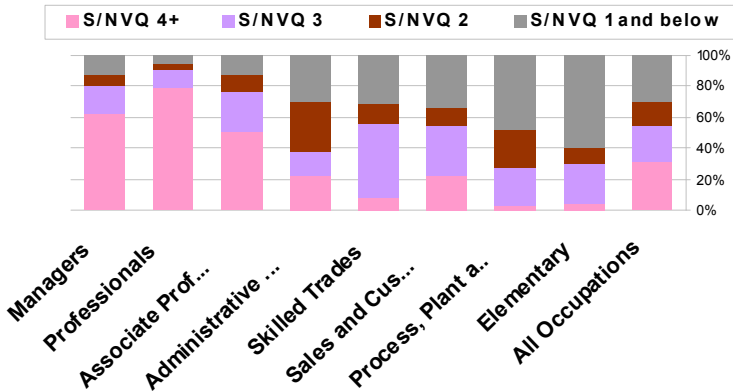
** GVA - Gross value added (GVA) represents the amount that individual businesses, industries or sectors contribute to the economy.

Occupational Distribution, Skill Level and Skills Needs

Occupational Distribution³



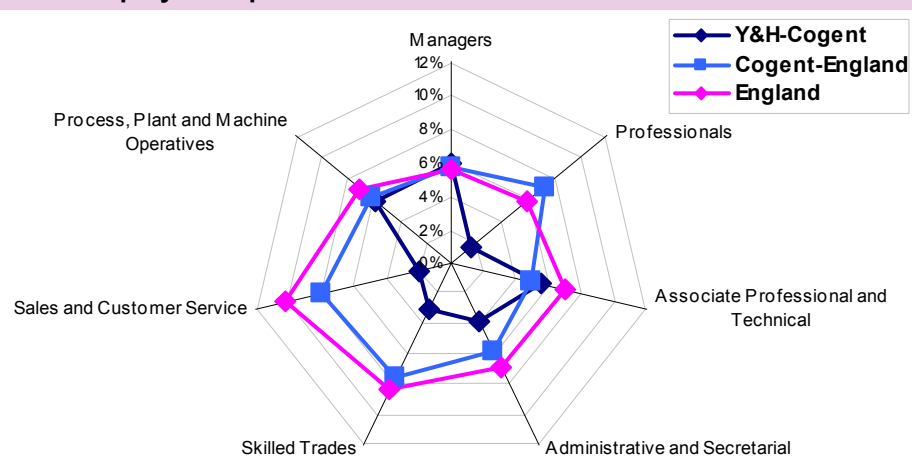
Skill Level by Occupation³



Skills Gaps²

	% of firms reporting skills gaps	% of staff with skills gap
Oil and Gas	5%	1%
Petroleum	15%	3%
Chemicals	20%	4%
Pharmaceuticals	11%	0%
Polymer	33%	7%
Y&H- Cogent	21%	4%
Y&H- Region	17%	6%

Skills Gap by Occupation²



Skills Demand and Training²

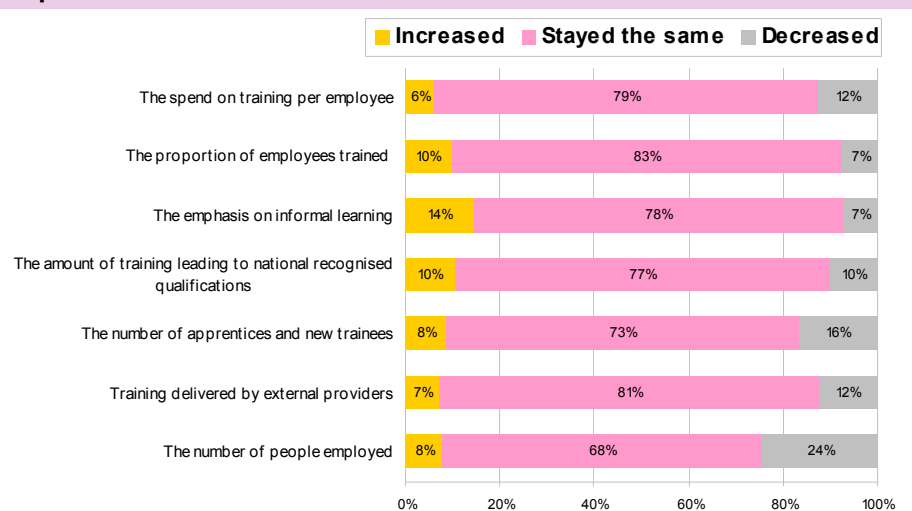
- The proportion of companies reporting vacancies decreased by 13% and internal skills gaps fell by 11% from 2007- 2009.
- The proportion of employers reporting skills gap is higher than the national average by 4% in 2009.
- The proportion of employers providing training fell by 15%, however workforce training has increased by 18% in 2009 from 2007.

	Y&H-Cogent		England	
	2007	2009	2007	2009
Proportion of firms reporting vacancies	23%	10%	18%	12%
Proportion of firms reporting 'hard-to-fill' vacancies	10%	3%	8%	3%
Proportion of firms reporting a skills shortage vacancy	4%	2%	6%	2%
Proportion of firms reporting internal skills gaps	32%	21%	16%	19%
Proportion of firms providing training (last 12 months)	76%	61%	67%	67%
Proportion of workforce trained (last 12 months)	37%	55%	63%	56%

Training by Industry² (last 12 months)

	% of firms provided training	% of staff trained
Oil and Gas	100%	28%
Petroleum	59%	55%
Chemicals	66%	73%
Pharmaceuticals	80%	92%
Polymer	56%	19%
Y&H- Cogent	61%	55%
Y&H- Region	65%	53%

Impact of Recession²



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