

# Sector C: Manufacturing

## Introduction

This article is one of a series that considers the employment and economic value of various sectors of the Lancashire economy. Please see the [sector profiles introduction page](#) details of where we derive the employment and gross value added results, plus how we identify various organisations in Lancashire as belonging to particular sectors.

The [standard industrial classification](#) SIC provides a framework for the collection, tabulation, presentation and analysis of business data, and the manufacturing sector covers the SIC codes detailed in table 1.

## The economic value of the manufacturing sector

Gross Value Added (GVA) is generally regarded as the best measure of the sum of economic activity within an area. Local estimates of gross value added (GVA) are published by the [Office for National Statistics](#) that are split by various industrial sectors. The estimates of GVA for 2014 reveal that, manufacturing accounted for £5.0 billion which represented 17.9% of the total GVA figure for the Lancashire-14 authority area.

The following results present a breakdown of the value of the various Lancashire manufacturing sub-sectors. Transport equipment, includes aerospace, had a very substantial GVA figure of £1,181 m or 23.8% of the value created by the whole of Lancashire's manufacturing sector. Food products, beverages and tobacco (£725 million) was comfortably in second place, whilst basic metals and metal products was third with £564 m.

<b>GVA by manufacturing sub-sector (2014)</b>	<b>£ (million)</b>
Food products, beverages and tobacco	£725m
Textiles, wearing apparel and leather products	£351m
Wood and paper products and printing	£325m
Coke and refined petroleum products	£43m
Chemicals and chemical products	£442m
Basic pharmaceutical products and preparations	£66m
Rubber and plastic products	£442m
Basic metals and metal products	£564m
Computer, electronic and optical products	£115m
Electrical equipment	£48m
Machinery and equipment not elsewhere classified	£240m
Transport equipment	£1,181m
Other manufacturing and repair	£442m
<b>Total</b>	<b>£4,965m</b>

Source: Office for national statistics

## An overview of manufacturing employment in 2014

With an estimated national employment figure in 2014 of some 2.4 million, manufacturing provides far fewer jobs than it used to and the share of manufacturing in total employment has fallen considerably. In 2014, 8.2% of the workforce was engaged directly in Britain's manufacturing sector. Manufacturing job trends in Lancashire have mirrored the national pattern with decades of employment reductions interspersed with brief periods of respite, but Lancashire continues to have a much greater reliance on manufacturing employment than for Great Britain as a whole.

The 2014 count of manufacturing employment in the Lancashire-14 area of 84,300 represented 13.5% of total employment in the area. The percentage was slightly higher for the 12-district Lancashire County Council area where the 69,300 people in employment amounted to 13.9% of the total workforce.

Excluding the relatively small number of working owners allocated to the manufacturing sector (approximately 900), a total of 92.9% of manufacturing employees in the Lancashire-14 area were full-time, leaving just 7.14% working on a part-time basis.

Notwithstanding the long-term contraction in employment, the manufacturing industry remains very important in Lancashire. It constantly looks to become a more high value, flexible and dynamic sector, responding to global forces and building niche businesses. A number of companies have moved away from trying to compete on price via volume production or commodity products towards a more knowledge intensive and often less price sensitive manufacturing "niche", focusing on providing quality and long-term customer services. Manufacturing sub-sectors such as aerospace and advanced engineering are noted for their knowledge intensity, high productivity, capital investment and paying well-above average salaries.

The manufacturing sector provides direct, highly visible and reasonably well-paid jobs, and is an important generator of employment in the rest of the economy. Much of manufacturing's payments in wages and salaries, purchases and even capital investment flows back into local communities. This provides further employment and business opportunities for all manner of support industries.

Manufacturing companies are often the leading edge customers for all sorts of services and the major source of innovation and technical progress which in turn also feeds into service providers. Indeed, many of the employment roles previously categorised as "manufacturing" are now registered as "service" sector jobs due to the well-established trend of outsourcing and the use of contract labour. In addition, the change in the nature of the work needed to complete a range of manufactured products leads to a complex and nowadays often an artificial split between manufacturing and service sector processes.

## **Out-sourcing**

As a result of the out-sourcing that has taken place in many manufacturing companies, the definition between the two activities of "manufacturing" and "services" is becoming ever more blurred. Many manufacturers incorporate services within their products and sometimes these are a more profitable proposition than the manufacturing itself. Equally, there are service sectors such as many wholesalers who incorporate manufacturing "finishing" operations. Most products today are a bundle of different processes, some of them manufacturing, some of them services, and the way in which this bundle is tied together varies with industries and over time.

Industry has always bought-in non-industrial services to supplement its industrial processes. These have included many basic services and charges such as rents, insurance premiums, bank charges, professional services, telephones, plant hire, transport, and so forth. Over a number of years, there has been a move towards specialisation as contracting out has accelerated and companies focus their activities on "core functions". There is a well-established tendency to contract-out other specialist services such as cleaning, information technology, security, catering, distribution and logistics and various technical services formerly provided in-house. Large numbers of jobs previously allocated to manufacturing have been re-classified as part of the service sector and represent a transfer rather than "lost" manufacturing jobs or "new" service jobs per se. The service sectors that cover real estate, professional, scientific, technical, administration and support activities appear to have benefited in particular from the outsourcing of jobs that were previously classified under the manufacturing heading.

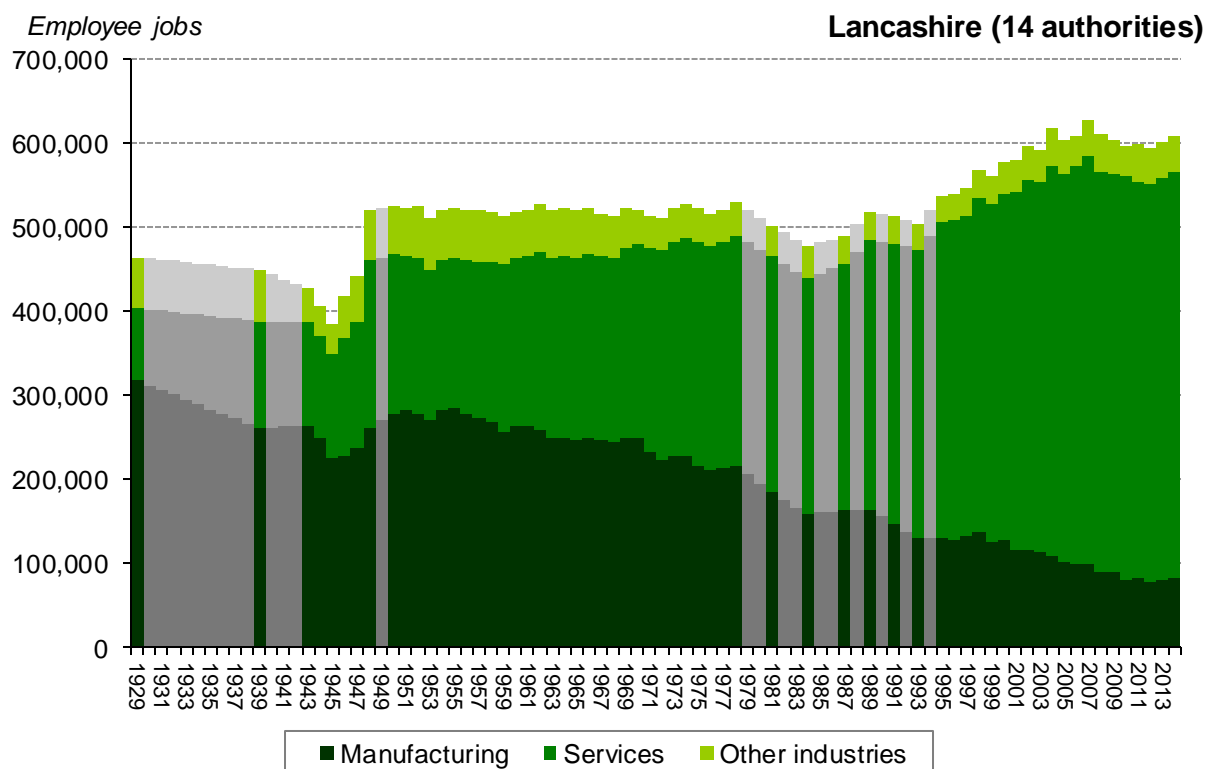
Fairport Engineering is a Lancashire company that is classified under engineering design activities for industrial process and production, which is a service sector activity. The company exemplifies the complex split between manufacturing and service

activities. Torotrak in Leyland is an example of a company that has a dual classification under both a service and manufacturing sector heading.

## Manufacturing employment trends (historic context)

Manufacturing industry has a long pedigree in Lancashire. In the first quarter of the 20th Century some 320,000 people were engaged in manufacturing of one sort or another, representing two-thirds of the total workforce. Three-quarters of this industrial workforce were employed by the textile industry alone (especially cotton) which dominated economic activity in many local communities to a degree scarcely imaginable today. From its zenith just before the outbreak of the First World War the industry underwent severe contraction. The 1930s in particular was a period of great distress in the Lancashire textile towns, with high unemployment and heavy outward population movement.

**Figure 1 Total employees by broad sector, 1929-2014 (all years exclude working owners) 14-authority Lancashire area**



Data in grey is interpolated (no actual results available).

Source Ministry of Labour/ONS - ER/II Employment Records/ABI/ABS/BRES

The Second World War was a decisive event in breaking the dominating hold of the textile and allied industries on the local economy as many new sectors of industry were introduced or greatly expanded (e.g. aerospace, munitions, engineering) as production was turned to supporting the war effort. Many of these industries and their infrastructure remained after the war and played a crucial role in the diversification of the post-war economy as the hold of textiles and other staples was rapidly eroded. Even in the early 1960s more than half of the county's insured workforce was still classified to manufacturing.

The national manufacturing recession of the early 1980s marked a major discontinuity in previous employment trends and represented a radical and permanent alteration in the nature of the local economy. Over the short period 1979-1984 nearly 60,000 jobs disappeared from Lancashire manufacturing industry - a fall of more than a quarter. Whole industrial sectors virtually disappeared and much industrial capacity was scrapped.

After some modest recovery in the late 1980s, the post-1990 recession and an enforced restructuring within the local defence, aerospace and vehicles industries again saw manufacturing badly hit with a further loss of 36,000 jobs (-22%). The sector then enjoyed a brief period of respite and relative stability but after peaking in 1998 employee numbers again began to ratchet downwards as industry responded to the high value of Sterling against the Euro and intense overseas low cost competition exacerbated by falling demand as world trade growth faltered.

The rise of China and subsequently other countries as major low cost manufacturers has further compounded the difficulties of many manufacturers across a wide range of industrial sectors. Between 1998 and 2008, a further 47,600 manufacturing jobs (-34.4%) were lost to Lancashire, entailing, in some instances, the transfer of production capacity itself away from the county.

That there has been a strong tendency towards "de-industrialisation" in employment terms is indisputable. However this does not necessarily mean that the manufacturing industry has a greatly reduced role within the wider economy. Productivity improvements over the years mean that fewer employees are needed, whilst some of the employment fall can be explained by the way official figures tend to exaggerate de-industrialisation. The last two major changes to a revised Standard Industrial Classification (SIC 1992 and SIC 2007), for example, resulted in national manufacturing employment estimates being reduced by approximately 10% and 3% respectively compared with the previous classifications. Also the manufacturing sector is nowadays under-stated because of the use of "out-sourcing" or buying in of many service activities previously undertaken in-house and which formed part of the manufacturing headcount.

### **Employment in manufacturing at its lowest level for over 170 years**

According to the Office for National Statistics, the last time prior to 2005 that employment in manufacturing was recorded below three million in any published series was in the 1841 national census when the total was just under 2.5 million. By 1851 when the next census was undertaken, the number employed in manufacturing had risen to 3.6 million. At that time there were more than one million domestic servants and the same number of agricultural workers – out of more than seven million workers. Textile companies and boot and shoe makers were amongst the biggest employers. There were also button manufacturers, fishhook makers, glass and bottle producers and anchor and chain makers. The general upward trend continued until 1957 when manufacturing employment in Britain peaked at 9.4 million. By 2014, employment in manufacturing at the GB level was just 2.39 million.

## **District-level analysis**

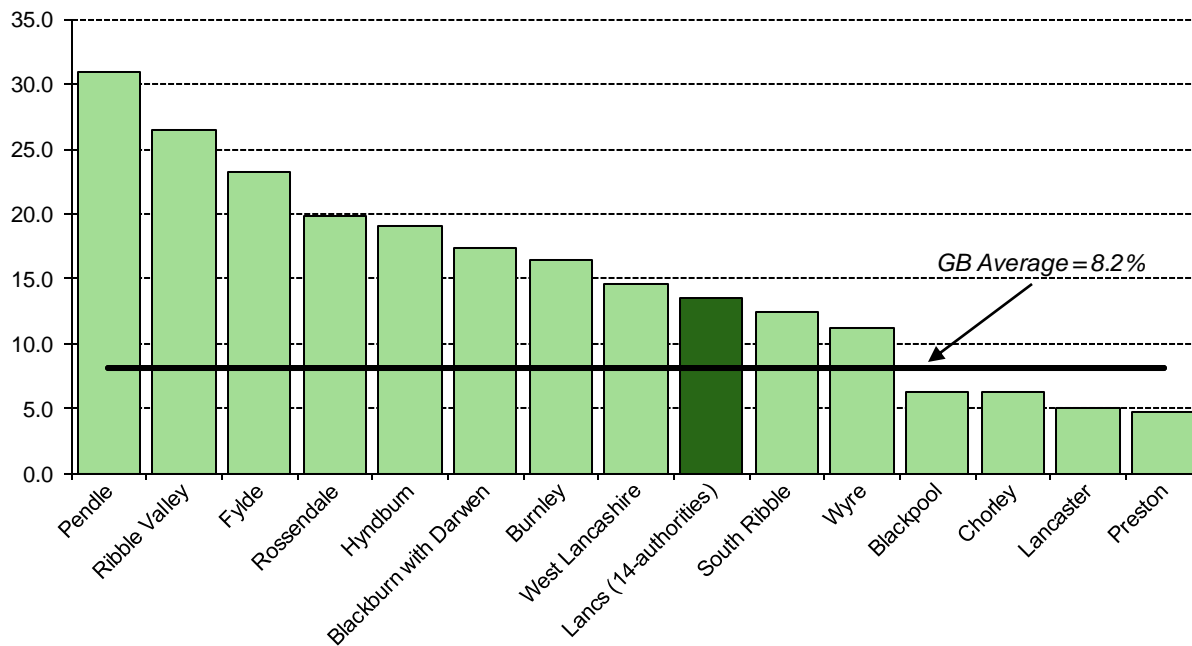
There are few other UK areas of comparable geographical size to the Lancashire-14 area that continue to retain such a degree of strength in manufacturing industry, but the employment distribution is not evenly split across the county. In some Lancashire authorities, manufacturing employment remains of paramount importance for the local economy, whilst in other areas it has a very modest role in the local economy.

Eight of the fourteen local district authorities have manufacturing employment shares that in 2014 were above the national average (Figure 2). The percentage of manufacturing employment rises to significantly high levels in districts such as Pendle, Fylde and Ribbles Valley that have strong local concentrations of employment in the aerospace sector.

Preston has by far the lowest proportion of manufacturing employment in the county and is therefore far more reliant on the service sector in general than other parts of the county. It has a strong presence in most service sub-sectors including the wholesale and retail sector. With two universities in the authority, Lancaster has a particular specialism in the education service sector, whilst the visitor economy and public administration dominate employment opportunities in Blackpool. The low level of manufacturing

employment in Chorley is partly the result of the authority's high level of employment in real estate, professional, scientific and administrative sector.

**Figure 2 Employment in manufacturing as a percentage of all employment, 2014**



Source ONS - Business Register and Employment Survey

## Manufacturing sub-sectors

Table 1 lists employment numbers per sub-sector, and is followed by details of important manufacturing businesses in each sector. Businesses range from locally owned firms that only manufacture in Lancashire to major multinational organisations that have a Lancashire site as part of their worldwide presence.

The list of 24 manufacturing sub-sectors corresponds with the 2007 edition of the standard industrial classification of economic activities (SIC) that became effective from 1st January 2008.

The [Companies House](#) website has a 'find company information' option that usually allocates companies to SIC headings. This has been used to help allocate some of the following businesses to the correct manufacturing sub-sector. In some cases however, it is possible that a business has been incorrectly allocated to a particular sub-sector. Also large companies with multiple sites across the country and beyond can have a classification that differs from the specific activity being undertaken by the site in Lancashire.

**Table 1 Manufacturing employment in Lancashire by sector, 2014**

standard industrial classification codes	Manufacturing sector	Lancashire 12-district area	Lancashire 14-authority area
10.11-10.92	Food products,	9,800	12,400
11.01-11.07	Beverages	800	1,100
12.00	Tobacco	0	0
13.10-13.99	Textiles	2,700	3,700
14.11-14.39	Wearing apparel	500	700
15.11-15.20	Leather and related products	600	600

standard industrial classification codes	Manufacturing sector	Lancashire 12-district area	Lancashire 14-authority area
16.10-16.29	Wood and other products of wood and cork except furniture; manufacture of articles of straw and plaiting materials	900	1,000
17.11-17.29	Paper and paper products	2,000	3,300
18.11-18.20	Printing and reproduction of recorded media	1,900	2,300
19.10 and 19.20	Coke and refined petroleum products	100	100
20.11-20.60	Chemicals and chemical products	2,900	3,900
21.10 and 21.20	Basic pharmaceutical products and pharmaceutical preparations	700	700
22.11-22.29	Rubber and plastic products	5,600	8,000
23.11-23.99	Other non-metallic mineral products	1,500	1,700
24.10-24.54	Basic metals	1,700	1,700
25.11-25.99	Fabricated metal products except machinery and equipment	7,700	9,300
26.11-26.80	Computer electronic and optical products	1,400	1,600
27.11-27.90	Electrical equipment	1,100	1,600
28.11-28.99	Machinery and equipment not elsewhere classified	3,500	4,200
29.10-29.32	Motor vehicles, trailers and semi-trailers	2,700	2,900
30.11-30.99	Other transport equipment	13,600	13,700
31.01-31.09	Furniture	4,500	5,600
32.11-32.99	Other manufacturing	1,300	1,900
33.11-33.20	Repair and installation of machinery and equipment	2,100	2,500
	<b>Total manufacturing employment</b>	<b>69,300</b>	<b>84,300</b>

Source Business Register and Employment Survey

## 1. Food products (Standard Industrial Classification (SIC) codes 10.11 to 10.92)

This is a major manufacturing sector in the Lancashire-14 area that had an employment total of 12,400 in 2014. This was second only to the 'other transport equipment' sector that includes the Lancashire aerospace sector.

The food products sector links primary producers with retailers and consumers. The industry adds value to agricultural produce and other material ingredients to convert them into finished consumer-ready products or into intermediate products used in further processing and non-food industrial activities. Virtually all agricultural commodities incur some degree of processing before reaching their final use.

Large food and drink manufacturing employers in the area include biscuit manufacturers such as Fox's Biscuits and Farmhouse Biscuits; pie and pudding manufacturers W Holland & Son; Fredricks Dairies producing ice-cream products; Tangerine Confectionery; Lofthouse of Fleetwood, suppliers of the well-known "Fishermans Friend" lozenges and Dr. Oetker that has a Pizza production facility in Leyland.

Gilbert's Foods in Heysham specialises in the manufacture of pasteurised and sterilised meat products. Morris Quality bakers is a Coppull based company offering a range of bakery products, whilst Clayton Park Bakery near Accrington produces pies and cakes. Warburtons is a major family owned bakers with its head office outside the county in Bolton. It does however have a bakery in Burnley and a distribution centre near Blackpool.

Lailas Fine Foods in Blackpool produces chilled and frozen ready meals for both the retail and foodservice markets, whilst Shazans Foods on Walton Summit and the Blackburn company KQF specialise in halal foods.

There are a number of specialist cheese makers in Lancashire that include Greenfields Dairy Products of Goosnargh, Dewlay in Garstang, and Butlers Farmhouse Cheeses.

Glistens Confectionery has a site at Blackburn, whilst the hand-made cake producer Lathams of Broughton has its factory and head-office in Preston. Cherrytree Bakery near Burnley produces a range of both luxury and traditional cakes that include Chorley Cakes. Goody Good Stuff is a Heysham based sweet manufacturer. Summit Foods produce cooked foods and snack-based products at Walton Summit in Bamber Bridge.

There are a number of specialist companies in the county that look to satisfy particular requirements for health/nutritional products. Arthro Vite Ltd in Lytham is a manufacturer of collagen health products, whilst Science in Sport is based at Brockhall Village near Blackburn and produces nutritional products for athletes.

Kershaws frozen foods in Scarisbrick, West Lancashire, has for many years been producing frozen ready meals.

Fiddler's Lancashire Crisps is a well-established family firm in Rufford, West Lancashire, whilst Hartley's Farm Foods in Nelson produces a wide range of cooked meats and sandwich fillings.

The sector also includes companies that manufacture animal feeds. In Lancashire this includes Dugdale Nutrition in Clitheroe. Also of note is Golden Acres in West Lancashire which is said to be Europe's largest manufacturer of own label, premium dry pet foods. Natures Aid Ltd, in Kirkham specialises in vitamins and supplements, and is classified under the manufacture of food products not elsewhere classified.

Fruitapeel Ltd, in West Lancashire is a manufacturer of juices, smoothies and fruit/confectionary sauces, and is classified within this sub-sector and not under beverages.

## **2. Beverages (SIC codes 11.01 to 11.07)**

This is a sector that had only 1,100 people in employment in 2014, but it does include the very well established Lancashire companies of Daniel Thwaites in Blackburn, and the Burnley Brewery Moorhouses.

Across the country there has been a large increase in the number of micro-breweries. Examples in Lancashire are the Bowland Brewery in the Ribble Valley, the Hopstar Brewery in Darwen and the Three Bees Brewery that is based at the Black Bull pub on the outskirts of Blackburn. The Lancaster Brewery occupies a modern facility on Lancaster Leisure Park and is somewhat larger than a microbrewery.

This section includes the multi-national manufacturer of soft drinks Cott Beverages that has a production site in Nelson. Mawson's is an old established firm in Bacup that produces traditional soft drinks, whilst Simpsons Beverage Supplies in Blackpool has been trading for many years and produces a wide range of squashes, cordials and syrups. Finally in this section, it is important to mention the Fitzpatrick's range of soft drinks that are sold in the country's last remaining temperance bar in Rawtenstall.

## **3. Tobacco (SIC code 12.00)**

This is the only manufacturing sector that has no representation in Lancashire. Please note however that the county has an important interest in the e-cigarette market, but this is not classified under the tobacco heading (see electrical equipment section).

## **4. Textiles (SIC codes 13.10 to 13.99)**

A sector with a long history and a strong association with Lancashire, and one which continues to have an important future. In 2014, there were estimated to be 3,700 workers allocated to the sector. The days of the very large integrated textile manufacturing company employing many hundreds or even thousands of workers are long gone, and nowadays the industry is composed mainly of small and medium-sized firms.

Some of the larger and well known employers within the county include the Blackburn company Cavalier Carpets Ltd. Panaz near Burnley, designers and manufacturers of flame retardant fabrics. Also in East Lancashire are Cloverbrook Fabrics, manufacturers of knitted and woven fabrics.

John Spencer Textiles of Burnley weave a wide range of fabrics servicing many diverse market sectors. Herbert Parkinson is a soft-furnishings firm in Darwen that is owned by the John Lewis Partnership. Andrew Industries is a multi-multinational company with a site near Accrington is classified under manufacture of non-wovens and other technical and industrial textiles.

Outside East Lancashire, companies in the sector include Cliq Designs Ltd in Bamber Bridge, manufacturers of quilted bead spreads, throws and cushions. Jacquard Weaving in Withnell near Chorley is a manufacturer of woven badges, ties, labels and epaulettes.

Lantex Manufacturing Company, in Accrington makes kitchen textiles such as tea towels and aprons, and first started in 1918 in Haslingden as a weaving manufacturer.

#### **5. Wearing apparel (SIC codes 14.11 to 14.39)**

This sector is closely linked to textiles and contains a number of well-known Lancashire firms that together employ 700 people. Examples of companies in the sector include Cookson and Clegg, a Blackburn company that manufactures military clothing.

Simon Jersey Ltd, specialises in the design and supply of corporate wear uniforms, therefore its allocation to the manufacturing sector is probably incorrect. The company does however retain the capability to manufacture items if outsourced products are unable to fully meet an order deadline. This type of approach highlights one of the problems of being able to distinguish between the manufacturing and service sectors within a modern economy.

#### **6. Leather and related products (SIC codes 15.11 to 15.20)**

This sector accounts for around 500 jobs in the Lancashire-14 area, and following successive waves of downsizing is much reduced in comparison to former years. Lancashire's largest footwear manufacturing company is Beaconsfield Footwear trading as Hotter Comfort Concept based in Skelmersdale.

#### **7. Wood and other products of wood and cork except furniture; manufacture of articles of straw and plaiting materials (SIC codes 16.10 to 16.29)**

This is a sector that in 2014 employed 1,000 people in the county. It is closely allied with the health of the construction industry and is dominated by small enterprises. Among the larger firms represented locally are Europanel (UK) Ltd in Skelmersdale, who are leading independent manufacturers of melamine faced chipboard; and Pasquill Roof Trusses a national company with a site in Chorley, that makes timber engineered products for the construction industry.

#### **8. Paper and paper products (SIC codes 17.11 to 17.29)**

This is an important sector in the county with an employment total of 3,300. A number of the larger companies in the sector are local branches of major international organisations. The Blackburn with Darwen area contains a number of companies in this



sector. These include Accrol Papers that specialise in the production of toilet and kitchen rolls; Graham and Brown, said to be the UK's largest wallpaper manufacture whilst Heritage Envelopes in Blackburn, as the name suggests, produces envelopes.

The Skelmersdale branch of SCA Hygiene is part of an international consumer goods and paper company, whilst Walki in Garstang and TRM Packing near Ormskirk are two examples of the many companies that provide paper and board packaging solutions. BPC (UK) Ltd produces various forms of paper rolls. The Paper Cup Company in Clitheroe makes bespoke printed paper cups.

## **9. Printing and reproduction of recorded media (SIC 18.11 to 18.20)**

This is a sector that accounted for an employment number of 2,300 in 2014. Haslam Printers in Chorley specialises in producing corporate sales literature. Janda Digital in Kirkham produces a range of different labels, whilst Ward Knowles in Accrington makes a wide range of printed items.

## **10. Coke and refined petroleum products (SIC 19.10 and 19.20)**

This is a relatively small sector in Lancashire which employs just around 100 people. Total Bitumen UK Ltd has a site in Preston. Bitumen is used in road construction and industrial applications.

## **11. Chemicals and chemical products (SIC codes 20.11 to 20.60)**

This is a large sector in Lancashire, which in 2014 had an employment level of 3,900. As well as a base of indigenous companies supplying intermediate and final products, several multi-nationals also have a presence in the county. Major employers within the sub-region include Eka Chemicals in Blackburn (part of Akzo Nobel); Asahi Glass Fluoropolymers, producers of fluorochemicals and materials and William Blythe, manufacturers of organic chemicals.

One old established soap manufacturer in Chorleyworth a mention is Droyt Products Ltd. Blackburn Chemicals state that they are world leaders in foam control, whilst Crown Paints has its headquarters in Darwen. Evans Vanodine International, on the outskirts of Preston manufactures janitorial, food process and livestock hygiene chemicals. Liquid Plastics in Preston specialise in liquid roofing technology and cold applied roofing systems. Victrex, with premises at Thornton near Fleetwood, is involved in the manufacture of high performance polymers.

## **12. Basic pharmaceutical and pharmaceutical preparations (SIC codes 21.10 and 21.20)**

This is a sector with an employment figure of around 700. An example of a major international firm in this sector that has Lancashire presence is Synergy Health UK LTD, which has a head office on the outskirts of Chorley.

## **13. Rubber and plastic products (SIC codes 22.11 to 22.29)**

This is a very large sector which provides employment for 8,000 people across Lancashire. There is a significant clutch of such companies in the Blackburn with Darwen area including; RPC Containers, a leading manufacturer of rigid plastic packaging; Tensar International, manufacturers of geogrid and geotextile products for ground stabilisation solutions and has its worldwide office (outside of the USA) in Blackburn, and Weltonhurst Ltd, leading provider of specialist blow moulding services.

Elsewhere other important players include Flexipol Packaging Ltd, flexible packaging manufacturers; Glasdon UK Ltd Blackpool-based designer and manufacturer of street furniture, environment and safety products and modular buildings; Veka plc, extruders of PVC-U window and door systems and Wardle Storeys, manufacturers of specialist technical foils, acoustic materials, fabricated components and related products. Metflex is a rubber mouldings manufacturer in Great Harwood, whilst Orthoplastics Ltd in Bacup specialises in plastics for the medical joint industry. The Polytank group near Blackpool specialises in plastic cold water storage units. Sanko-Gosei in Skelmersdale supplies plastic injection moulded components for the automotive market.

What More UK in Padiham was classified under the other plastic products sub-heading whilst Allscope projects in Nelson specialises in glass reinforced plastic products. Finally, Hurst Green Plastics is a well-established company in Whalley

#### **14. Other non-metallic mineral products** (SIC codes 23.11 to 23.99)

An employment total of 1,700 is allocated to this sector in the Lancashire. Larger local employers operating within the county include Hanson Heidelberg Cement Group in Clitheroe. Flexcrete Technologies in Leyland has developed polymer and epoxy modified cementitious coatings and high performance technical coatings.

Shackerley is an Euxton company that is classified under the sub-heading of manufacture of other ceramic products not elsewhere classified.

#### **15. Basic metals** (SIC codes 24.10 to 24.54)

The sector had an employment number of 1,700 people across Lancashire. The introduction of the 2007 edition of the standard industrial classification resulted in nuclear fuel being moved to basic metals.

Processing of nuclear fuel is the largest single activity, represented by Westinghouse (Springfields) at their 200-acre site. Springfields, to the west of Preston, originally opened as a civilian nuclear facility in 1946. It was the first plant in the world to make nuclear fuel and began to supply the first commercial nuclear power reactor from 1956. The site is nowadays operated by Springfields Fuels Limited, under the management of Westinghouse Electric UK Limited.

#### **16. Fabricated metal products except machinery and equipment** (SIC codes 25.11 to 25.99)

This is a large sector, and in 2014 was the third most important manufacturing sub-sector in Lancashire in terms of employment (9,300). Examples of firms include Presspart Manufacturing which produces deep drawn metal pressings for the pharmaceutical and other specialist industrial sectors. Gledhill Building Products is a manufacturer of hot water storage cylinders and thermal storage appliances and Fort Vale Engineering manufactures discharge relief valves and fittings for road tankers and tank container industries.

UBH International is a long-established company based in Burscough. It states that it is the world's largest manufacturer of tank containers. Fuel Proof Ltd near Heysham is a manufacturer of fuel tanks.

#### **17. Computer electronic and optical products** (SIC codes 26.11 to 26.80)

This sector employs 1,600 people and a selection of the larger companies operating within the sub-region include AMS Neve, producing professional audio equipment; Promethean Ltd, interactive learning technology, and Protec Fire Detection, is said to be the UK's largest independent fire alarm manufacturer.

#### **18. Electrical equipment** (SIC codes 27.11 to 27.90)

This sector has an employment total of 1,600 and three examples of multi-national organisations in this sector with sites in Lancashire are, and Alstom Transport, in Preston, which manufactures electrical traction equipment for railway stock. ACDC of Barrowford in East Lancashire specialises lighting systems.

The challenges faced when allocating companies to sectors is highlighted by Totally Wicked, the Blackburn firm involved with e-cigarettes. The business is allocated to the manufacture of other electrical equipment sub-heading.

## 19. Machinery and equipment not elsewhere classified (SIC codes 28.11 to 28.99)

This is an important sector with an employment total of 4,200 in Lancashire. Larger employers include Cobble – Van de Wiele, which produces tufting machines and ancillaries; Addison-McKee provides pipe bending machinery, tooling and muffler assembly for the aerospace, automotive, marine and other sectors; NIS Ltd, provides specialist and bespoke design and manufacture of integrated engineering systems and plant equipment; Britannia Living, manufacturers of domestic cooking appliances and Emerson and Renwick near Accrington was founded in 1918, and produces production machinery. PDS Engineering in Nelson makes high precision components, but it is a company that is difficult to classify and may be listed here under the wrong heading. The company was involved in the Thrust supersonic car project for Richard Noble and supports other world record setting projects.

Torotrak Leyland has a dual classification under both a service sector heading and within this manufacturing sub-sector. The company produces innovative gearless traction drive transmissions, variable drive superchargers and mechanical kinetic energy recovery systems.

Spiroflow is a Clitheroe firm that manufactures equipment for handling dry bulk solids.

## 20. Motor vehicles, trailers and semi-trailers (SIC codes 29.10 to 29.32)

This sector accounts for an employment total of 2,900, and the automotive industry in Lancashire is still well represented among the major local industrial and commercial companies in Lancashire. Leading players include Leyland Trucks, a subsidiary of Paccar Inc, which designs and manufactures a range of trucks at its automated assembly plant on the outskirts of Leyland. Lunar Caravans manufactures a wide range of touring caravans and motor homes and has its UK headquarters in Lostock Hall, Preston and TRW in Burnley, produces switch and electronic automotive controls

Solomon Commercial Ltd in Haslingden has grown to become a leading European manufacturer of refrigerated vehicle conversions. Erlson Precision Components in Skelmersdale is classified under the 'manufacture of other parts and accessories for motor vehicles' along with Piolax near Accrington.

## 21. Other transport equipment (SIC codes 30.11 to 30.99)

This is largest and a very significant manufacturing sector in the county with an employment figure of 13,700 in the Lancashire-14 area. Much of the work undertaken in the sector is high value and therefore supports a large number of well-paid jobs. Activities of aerospace-related companies dominate this sector.

Important employers classified to the sector in Lancashire include Aircelle, and Kaman UK. The Rolls Royce site in Barnoldswick is of major importance to the county but by far the largest and the most important local employer is BAE Systems. The company has two substantial sites at Warton and Samlesbury in the county. Both sites have been classified as one single enterprise zone for the Lancashire area. This will in particular assist in the development of the Samlesbury site that crosses the boundary between Ribble Valley and South Ribble districts.

The Blackpool firm of T.I.S.S. Ltd, specialise in fuel security and safety devices. Clean Airpower is a Leyland company that provides dual-fuel technologies for heavy goods vehicle engines. Scorpion Automotive is said to be the UK's leading supplier and manufacturer of vehicle security alarm systems and mobile communication Interfaces for cars and commercial vehicles.

Coolkit Ltd, in Padiham specialises in the manufacture of insulated linings to convert light commercial vehicles into fridge-vans.

Douglas Marine Limited is classified under the building of pleasure and sporting boats, whilst Kevin Parker Horseboxes is in the not elsewhere classified section.

The other transport equipment sector also includes the building of boats. Warrior Boats in Leyland, builds leisure boats and is said to be one of the biggest 'small boat' manufacturers in the UK.

## **22. Furniture (SIC codes 31.01 to 31.09)**

This sector accounts for a sizeable employment total of 5,600 across Lancashire. Larger employers include the; Silentnight Limited, one of the UK's leading bed manufacturers; GGI Office Furniture, manufacture and distribution of office furniture; Senator International Ltd of Accrington who design, manufacture and distribute of office furniture and Tetrad, in Preston manufacturers hand crafted sofas and chairs. Burgess Beds in Haslingden is a well-established mattress manufacturer. The Odd Chair Company is a manufacturer of furniture at its site near Preston.

## **23. Other manufacturing (SIC codes 32.11 to 32.99)**

Other manufacturing generates an employment total of 1,900 and is a sector that includes an eclectic mix of manufacturers. A number could perhaps have been allocated to one of the more specific sectors.

Advanced Combustion Engineering Ltd is a Haslingden firm that designs and manufacturers specialist combustion equipment. Precision Polymer Engineering is a manufacturer of high performance sealing solutions. Performance Springs Limited in Lytham St. Annes manufacturers springs, whilst Hope Technology Ltd of Barnoldswick is a bicycle parts manufacturer. 32300 manufacture of sports goods.

Ultraframe Ltd, manufacture conservatory roofing systems. Porter Lancastrian, produces drinks dispensing products and pumps to a global market.

Apeks Marine Equipment Ltd is a manufacturer of diving equipment. Scott Health & Safety Ltd is an international company with a site in Skelmersdale that makes respiratory protection products, monitoring and sensor equipment. Carradice is a long-established Nelson firm that makes bicycle bags. J&J Ormerod plc is an important employer in Bacup that manufactures kitchens and bedroom furniture. It is classified under this generic heading but could perhaps have instead been allocated to the furniture sector.

Vet Plus Ltd in Lytham produces its own range of specialist own range of veterinary products and is classified under this heading. Interfloor Limited, in Haslingden is a leading manufacturer of underlay and flooring accessories. Northern Neon Lights Ltd in Blackpool offers a range of products and is classified under this section. Process Instruments in Burnley, provide analyse and control solutions for the water and related industries.

Velocity Composites on the outskirts of Burnley has strong connections with the local aerospace sector, but its unique specialisms have placed it in this generic sector.

Mainstage in Lancaster produces portable seating and staging systems, whilst Woodscape in Blackburn creates hardwood street furniture.

## **24. Repair and installation of machinery and equipment (SIC codes 33.11 to 33.20)**

Technical engineering skills are essential if Lancashire is to prosper in the highly demanding commercial world, and expertise can be utilised in a considerable number of ways. In addition to the manufacture of new products, there is also scope for refurbishment and similar activities. In this sector, the employment total of 2,500 is spread among businesses involved in the repair of electronic, electrical and optical equipment, maintenance of ships and boats, aircraft and spacecraft and other transport equipment.

The inclusion of the repair of aircraft is means that the sector has strong links with the aerospace jobs allocated to the other transport equipment sector. Euravia is based in a rural part of Pendle district and is a prime example of an aviation company offering repair and overhaul services.

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