Corporate sectors – Fenland

This report aims at assessing the specialness of the Fenland economy by examining the key features characterising the corporate sectors in the area. The first part of the report provides an overview of the size of the corporate sectors in terms of number of companies, total employment and total turnover, while the second part focuses on the analysis of growth in employment and turnover over time. All data refer to Cambridge Ahead data produced by Dr Andy Cosh at the Centre for Business Research unless otherwise indicated.

1. Size

Table 1 reports the distribution of employment by sector (in levels as well as in percentage terms with respect to the total for all sectors in the area and to the total for each sector in the Combined Authority) for 2016-17.[1]

Table 1 Distribution of employment by sector in 2016-17

	Fenland			Combined Authority	
	Total employment	% of total	% of Combined Authority	Total employment	% of total
KNOWLEDGE INTENSIVE SECTORS					
Information Technology and Telecoms	232	1.9%	1.2%	19,419	8.2%
Life science and healthcare	2	0.0%	0.0%	14,106	6.0%
High-tech manufacturing	504	4.2%	2.3%	21,651	9.2%
Knowledge intensive services	96	0.8%	1.3%	7,148	3.0%
TOTAL KI SECTORS	*834*	*6.9%*	*1.3%*	*62,324*	*26.4%*
OTHER SECTORS					
Primary	2,508	20.8%	20.9%	12,020	5.1%
Manufacturing	1,596	13.2%	8.2%	19,465	8.2%
Wholesale and retail distribution	1,952	16.2%	7.9%	24,839	10.5%
Construction and utilities	1,406	11.6%	7.6%	18,600	7.9%
Transport and travel	615	5.1%	6.0%	10,305	4.4%
Property and finance	499	4.1%	1.9%	26,771	11.3%
Other business services	925	7.7%	3.4%	27,502	11.6%
Other services	836	6.9%	6.1%	13,677	5.8%
Education, arts, charities, social care	903	7.5%	4.3%	20,843	8.8%
TOTAL NON-KI SECTORS	*11,240*	*93.1%*	*6.5%*	*174,022*	*73.6%*
TOTAL ALL SECTORS	*12,074*	*100.0%*	*5.1%*	*236,346*	*100.0%*

Total employment in Fenland represents approximately 5% of total employment in the Combined Authority. Most of employment in the district appears to be concentrated in non-KI sectors. The largest share is in the Primary sector, which contributes 20.8% of total employment in Fenland and 20.9% of total employment for the sector in the Combined Authority. Other large sectors are Wholesale and Retail Distribution (with the greatest contribution coming from the Wholesale sub-sector), Manufacturing (especially Low-Tech Manufacturing), and Construction and Utilities (where

[1] The distribution of the number of companies by sector for 2016-17 is included in Table A.1. A comparison of employment estimates by sector between Cambridge Ahead data and BRES data is presented in Table A.3.

the Developer / Builder and Other Construction sectors provide over half of total employment in the sector). Somewhat lower are the shares of employment in Other Business Services (7.7% of the total in the area) and in Education, Arts, Charities, Social Care (7.5%). The largest KI sector in Fenland is High-Tech Manufacturing (504), although the share of employment in the KI sectors as a whole is significantly below the average for the Combined Authority (6.9% and 26.4%, respectively).

Table 2 presents the distribution of turnover by sector (in £,000 as well as in percentage terms with respect to the total for all sectors in the area and to the total for each sector in the Combined Authority) for 2016-17.

Table 2 Distribution of turnover by sector in 2016-17

	Fenland			Combined Authority	
	Total turnover £,000	% of total	% of Combined Authority	Total turnover £,000	% of total
KNOWLEDGE INTENSIVE SECTORS					
Information Technology and Telecoms	32,475	1.5%	0.8%	4,001,051	8.8%
Life science and healthcare	214	0.0%	0.0%	2,876,583	6.4%
High-tech manufacturing	103,968	4.9%	1.8%	5,895,454	13.0%
Knowledge intensive services	10,209	0.5%	0.9%	1,088,008	2.4%
TOTAL KI SECTORS	*146,866*	*7.0%*	*1.1%*	*13,861,095*	*30.6%*
OTHER SECTORS					
Primary	363,463	17.2%	17.9%	2,027,805	4.5%
Manufacturing	183,406	8.7%	4.0%	4,609,590	10.2%
Wholesale and retail distribution	699,080	33.1%	8.1%	8,608,794	19.0%
Construction and utilities	323,929	15.3%	7.5%	4,294,229	9.5%
Transport and travel	92,633	4.4%	2.4%	3,834,353	8.5%
Property and finance	54,210	2.6%	1.8%	3,054,435	6.7%
Other business services	169,395	8.0%	6.1%	2,779,856	6.1%
Other services	41,756	2.0%	4.8%	876,403	1.9%
Education, arts, charities, social care	35,619	1.7%	2.7%	1,315,213	2.9%
TOTAL NON-KI SECTORS	*1,963,491*	*93.0%*	*6.3%*	*31,400,678*	*69.4%*
TOTAL ALL SECTORS	*2,110,357*	*100.0%*	*4.7%*	*45,261,773*	*100.0%*

More than 90% of total turnover in the area is generated in the non-KI sectors. The greatest contribution comes from the Wholesale and Retail Distribution sector, which represents 33.1% of total turnover in Fenland and 8.1% of total turnover for the sector in the Combined Authority. Considerable shares of turnover are also observed in Primary (17.2% and 17.9%), Construction and Utilities (15.3% and 7.5%, respectively), and Manufacturing (8.7% and 4.0%). Total turnover in the KI sectors accounts for 7.0% of the total for the district, compared to a figure of 30.6% for the Combined Authority. The largest share of turnover among KI sectors is generated in High-Tech Manufacturing, whereas rather limited is total turnover generated in Life Science and Healthcare.

Table 3 shows employment and turnover location quotients (LQs) with respect to the Combined Authority, the LEP and the UK for 2015-16. A similar analysis based on BRES data instead of Cambridge Ahead data is included in Table A.2.

Table 3 Employment and turnover location quotients in 2015-16 – Cambridge Ahead data

	Employment			Turnover		
	LQ (Comb. Auth. = 1)	LQ (LEP = 1)	LQ (UK = 1)	LQ (Comb. Auth. = 1)	LQ (LEP = 1)	LQ (UK = 1)
KNOWLEDGE INTENSIVE SECTORS						
Information Technology and Telecoms	0.24	0.39	0.43	0.20	0.23	0.29
Life science and healthcare	0.00	0.01	0.01	0.00	0.00	0.01
High-tech manufacturing	0.44	0.52	0.92	0.41	0.40	0.88
Knowledge intensive services	0.21	0.36	0.47	0.18	0.32	0.38
TOTAL KI SECTORS	*0.26*	*0.40*	*0.56*	*0.24*	*0.27*	*0.50*
OTHER SECTORS						
Primary	4.52	4.83	5.31	3.81	3.72	1.41
Manufacturing	1.59	1.30	1.38	0.79	0.66	0.97
Wholesale and retail distribution	1.64	1.82	0.92	2.04	2.25	1.86
Construction and utilities	1.31	1.61	2.44	1.44	1.07	1.08
Transport and travel	1.20	1.02	0.71	0.46	0.65	0.84
Property and finance	0.34	0.54	0.39	0.37	0.57	0.19
Other business services	0.57	0.36	0.46	1.24	0.98	1.06
Other services	1.18	0.52	0.50	0.95	0.42	0.39
Education, arts, charities, social care	0.86	0.95	1.28	0.55	0.56	0.89
TOTAL NON-KI SECTORS	*1.27*	*1.13*	*1.06*	*1.33*	*1.27*	*1.08*

The LQ analysis suggests that employment in the district tends to be concentrated in the Primary sector (4.83 relative to the LEP and 5.31 relative to the UK). These results imply that the share of employment in the Primary sector for Fenland is approximately five times the share of employment in the sector for the Combined Authority as a whole. High degrees of concentration can also be seen in Construction and Utilities (1.61 and 2.44, respectively) and Manufacturing (1.30 and 1.38, respectively). Moreover, some strengths are found in Education, Arts, Charities, Social Care (1.28 relative to the UK). Conversely, limited concentration is exhibited by the KI sectors, with none of these showing LQs greater than 1.

Similar results are reached in relation to turnover. There is particular concentration in the Primary sector (3.72 relative to the LEP and 1.41 relative to the UK), in the Wholesale and Retail Distribution sector (2.25 and 1.86, respectively) and in the Construction and Utilities sector (1.07 and 1.08, respectively). Among non-KI sectors, relatively low LQs are associated with Property and Finance (0.57 and 0.19, respectively) and Other Services (0.42 and 0.39, respectively). The concentration in terms of turnover is also limited for the KI sectors, particularly for Life Science and Healthcare.

Table 4 illustrates the distribution of the number of companies that are based in the area (in both absolute and relative terms) by firm size for 2016-17. The groupings used in Table 4 and in the other tables below are defined as follows: (i) micro firms = 1-9 employees; (ii) small and medium-sized firms (SMEs) = 10-249 employees; (iii) large firms > 250 employees. A detailed disaggregation of the number of companies by firm size is included in Table A.4.

Table 4 Distribution of number of companies by firm size in 2016-17 – Broad summary

	Fenland		Combined Authority	
	No. of companies	%	No. of companies	%
Micro firms	1,795	90.4%	22,214	90.4%
Small and medium-sized firms	188	9.5%	2,224	9.1%
Large firms	3	0.2%	123	0.5%
All firms in area	1,986	100.0%	24,561	100.0%

The distribution of companies by firm size for Fenland is broadly in line with that for the Combined Authority. Nine out of ten companies have between 1 and 9 employees, while SMEs represent around 10% of the total number of companies in the district. There are three companies that are based in the area and have more than 250 employees.

Table 5 reports the distribution of employment by firm size for 2016-17. A detailed disaggregation of the figures presented below is included in Table A.5.

Table 5 Distribution of employment by firm size in 2016-17 – Broad summary

	Fenland		Combined Authority	
	Total employment	%	Total employment	%
Micro firms	3,721	30.8%	46,737	19.8%
Small and medium-sized firms	6,516	54.0%	80,499	34.1%
Large firms	1,837	15.2%	109,110	46.2%
All firms in area	12,074	100.0%	236,346	100.0%

Over half of total employment in Fenland is concentrated in SMEs. This figure is considerably higher compared to the Combined Authority (34.1%), where almost half of total employment is found at firms with more than 250 employees. Micro firms in the district account for approximately 30% of total employment (as opposed to a figure of 19.8% for the Combined Authority), while large firms contribute the smallest share of employment (15.2% compared to 46.2% for the whole region).

Table 6 shows the distribution of turnover by firm size for 2016-17. A detailed disaggregation of the figures presented below is included in Table A.6.

Table 6 Distribution of turnover by firm size in 2016-17 – Broad summary

	Fenland		Combined Authority	
	Total turnover £,000	%	Total turnover £,000	%
Micro firms	622,869	29.5%	7,706,187	17.0%
Small and medium-sized firms	1,061,490	50.3%	13,536,479	29.9%
Large firms	425,997	20.2%	24,019,107	53.1%
All firms in area	2,110,357	100.0%	45,261,773	100.0%

The largest share of turnover in Fenland is originated by SMEs (50.3%), mainly by those with 10-49 employees (621,377). Micro firms generate 29.5% of total turnover in the district, well above the average for the Combined Authority (17.0%). The three companies in the area with more than 250 employees contribute 20.2% of total turnover in Fenland.

Table 7 lists the largest companies that are based in Fenland, among those with more than 100 employees, by their turnover in 2016-17.

Table 7 Largest Fenland-based companies (100+ employees) by turnover in 2016-17

Company name	Sector	Employment 2016-17	Turnover 2016-17 £,000
Stainless Metalcraft (Chatteris) Limited	High-tech manufacturing	144	13,330
Produce Investments PLC	Primary	1,254	185,102
Alan Bartlett & Sons (Chatteris) Limited		305	36,570
Nightlayer Leek Company Ltd.		131	9,787
LH Holdings Limited	Manufacturing	197	18,464
Fencor Packaging Group Limited		122	16,099
S B Components (International) Limited		133	14,979
Dagless Holdings Limited		207	14,224
March Foods Limited		142	10,286
MM (UK) Limited	Wholesale and retail distribution	278	204,325
Anglia Components Limited		128	52,732
Fenmarc Produce Limited		194	26,322
Ball. Roller & Transmission Bearings Limited		166	17,327
Knowles (Transport) Limited	Transport and travel	157	23,226
Lamb-Weston/Meijer UK Limited	Other Business Services	135	65,982
Agellus Hotels Limited	Other Services	126	4,570
Aspire Learning Trust (Whittlesey)	Education, arts, charities, social care	167	9,016
Cromwell Community College		140	6,364
Wisbech Grammar School		130	5,290

The overwhelming majority of the largest companies that are based in Fenland operate in the non-KI sectors. Some key players can be found in Wholesale and Retail Distribution (e.g. MM (UK) Limited), Primary (e.g. Produce Investments PLC and Alan Bartlett & Sons (Chatteris) Limited), Manufacturing (e.g. LH Holdings Limited and Fencor Packaging Group Limited) and Other Business Services (e.g. Lamb-Weston/Meijer UK Limited). The only KI sector that is represented for companies with more than 100 employees is High-Tech Manufacturing, which includes Stainless Metalcraft (Chatteris) Limited.

Table 8 provides a list of the largest companies that are active in Fenland, among those with more than 100 employees, by their turnover in 2016-17.

Table 8 Largest Fenland-active companies (100+ employees) by turnover in 2016-17

Company name	Sector	Employment 2016-17	Turnover 2016-17 £,000
ALS Laboratories (UK) Limited	Life Science and Healthcare	570	27,179
GKN Holdings PLC	High-tech manufacturing	51,381	8,822,000
Aggregate Industries UK Limited	Primary	3,358	1,179,198
Smurfit Kappa UK Ltd	Manufacturing	3,334	597,060
Mccain Foods (G.B.) Limited		1,274	452,314
Crown UK Holdings Limited		1,544	377,057
Princes Limited	Wholesale and retail distribution	6,900	1,506,781
Farmfoods Limited		4,099	669,201
International Procurement And Logistics Limited		2,239	241,484
John Grose Group Limited		404	175,689
Clinimed (Holdings) Limited		729	84,988
Del Monte (UK) Limited		171	55,902
Littlewoods Clearance Limited		130	10,172
Biffa Waste Services Limited	Construction and utilities	4,469	651,400
Foster Property Maintenance Limited		194	41,281
Ceva Logistics Limited	Transport and travel	3,953	394,488
Hays Travel Limited		1,080	332,041
Hunprenco (Precision Engineers) Limited	Other Business Services	122	9,877
Xeon Smiles UK Limited	Other Services	612	57,720
The Coaching Inn Group Ltd		509	17,089
Contract Fire Systems Limited		243	16,686
The Brooke Weston Trust	Education, arts, charities, social care	1,061	42,896
Askham Village Community Limited		162	4,585

The largest Fenland-active company (i.e. GKN Holdings PLC) operates in the High-Tech Manufacturing sector, although most of the largest companies that are active in the area belong to the non-KI sectors. These include Wholesale and Retail Distribution (e.g. Princes Limited and Farmfoods Limited), Primary (e.g. Aggregate Industries UK Limited), Construction and Utilities (e.g. Biffa Waste Services Limited), Manufacturing (e.g. Smurfit Kappa UK Ltd and Mccain Foods (G.B.) Limited), and Transport and Travel (e.g. Ceva Logistics Limited).

2. Growth

Table 9 reports the annualised growth rates in employment by sector over the three- and six-year periods to 2016-17.[2]

Table 9 Three-year and six-year employment growth (% pa) by sector

	Fenland		Combined Authority	
	3 years to 2016-17	6 years to 2016-17	3 years to 2016-17	6 years to 2016-17
Information Technology and Telecoms	5.2%	4.1%	6.9%	7.3%
Life science and healthcare	26.0%	0.0%	7.4%	6.7%
High-tech manufacturing	1.2%	3.4%	1.6%	1.9%
Knowledge intensive services	31.7%	22.1%	8.6%	5.9%
TOTAL KI SECTORS	*4.6%*	*5.0%*	*5.2%*	*4.9%*
OTHER SECTORS				
Primary	1.4%	5.2%	5.9%	4.9%
Manufacturing	3.9%	6.2%	4.7%	3.2%
Wholesale and retail distribution	-1.6%	2.1%	6.6%	4.3%
Construction and utilities	14.2%	11.5%	5.4%	4.6%
Transport and travel	8.3%	6.6%	11.7%	5.6%
Property and finance	7.7%	4.9%	8.6%	9.0%
Other business services	12.5%	10.3%	5.3%	5.9%
Other services	5.1%	5.4%	8.4%	8.7%
Education, arts, charities, social care	3.8%	15.0%	8.2%	13.8%
TOTAL NON-KI SECTORS	*4.4%*	*6.4%*	*6.9%*	*6.5%*
TOTAL ALL SECTORS	*4.4%*	*6.3%*	*6.4%*	*6.0%*

During the six years to 2016-17, total employment in Fenland has grown at a rate similar to that of the Combined Authority (6.3% and 6.0%, respectively). However, growth has slowed down over the past three years (4.4% for Fenland as opposed to 6.4% for the whole region). The highest rates of growth in employment are associated with Construction and Utilities (14.2% for the three-year growth and 11.5% for the six-year growth) and Other Business Services (12.5% and 10.3%, respectively). Among non-KI sectors, key sectors in terms of total employment, such as Primary, Manufacturing, and Construction and Utilities, have had higher rates of growth over the entire period compared to the Combined Authority. Employment growth has also been significant in Knowledge Intensive Services, although the sector contributes less than 1% of total employment in the area. Conversely, somewhat limited has been growth in the Wholesale and Retail Distribution sector, which has turned negative during the three years to 2016-17 (-1.6%).

[2] A comparison of employment growth rates by sector between Cambridge Ahead data and BRES data is presented in Table A.8.

Table 10 presents the annualised growth rates in turnover by sector over the three- and six-year periods to 2016-17.

Table 10 Three-year and six-year turnover growth (% pa) by sector

	Fenland		Combined Authority	
	3 years to 2016-17	6 years to 2016-17	3 years to 2016-17	6 years to 2016-17
Information Technology and Telecoms	5.0%	5.7%	10.4%	9.7%
Life science and healthcare	28.4%	0.0%	9.0%	8.7%
High-tech manufacturing	-1.0%	-1.3%	3.4%	3.9%
Knowledge intensive services	32.0%	20.4%	6.1%	6.9%
TOTAL KI SECTORS	*1.7%*	*0.9%*	*6.6%*	*6.6%*
OTHER SECTORS				
Primary	-1.4%	3.0%	3.2%	6.6%
Manufacturing	2.8%	6.4%	4.8%	5.1%
Wholesale and retail distribution	-3.9%	2.2%	11.3%	8.0%
Construction and utilities	20.7%	14.7%	9.3%	7.2%
Transport and travel	4.5%	3.6%	-0.2%	0.3%
Property and finance	8.3%	4.5%	9.6%	11.6%
Other business services	11.1%	9.8%	6.9%	5.5%
Other services	1.0%	1.2%	9.5%	9.3%
Education, arts, charities, social care	-21.7%	19.6%	5.6%	14.3%
TOTAL NON-KI SECTORS	*1.4%*	*5.2%*	*7.0%*	*6.5%*
TOTAL ALL SECTORS	*1.4%*	*4.8%*	*6.9%*	*6.5%*

Total turnover growth in the district has been lower than that for the Combined Authority (4.8% and 6.5%, respectively, throughout the entire period) and has decelerated in the three years to 2016-17. During the six-year period, growth has been particularly high for Education, Arts, Charities, Social Care (19.6%), Construction and Utilities (14.7%), and Other Business Services (9.8%). Key sectors in Fenland such as Manufacturing, and Construction and Utilities have grown more compared to the average for the Combined Authority. At the same time, there is evidence that the turnover generated by the Primary sector has decreased over the past three years (-1.4%). Considerable growth among the KI sectors is observed for Knowledge Intensive Services (32.0% for the three-year growth and 20.4% for the six-year growth), whereas turnover has somewhat declined in High-Tech Manufacturing (-1.0% and -1.3%, respectively).

Table 11 illustrates the absolute change in employment and turnover LQs (calculated with respect to the Combined Authority) by sector over the three- and six-year periods to 2016-17. A similar analysis for employment based on BRES data instead of Cambridge Ahead data is included in Table A.7.

Table 11 Change in employment and turnover location quotients (Combined Authority = 1) – Cambridge Ahead data

	Employment		Turnover	
	3 years to 2016-17	6 years to 2016-17	3 years to 2016-17	6 years to 2016-17
Information Technology and Telecoms	0.00	-0.05	0.00	-0.02
Life science and healthcare	0.00	0.00	0.00	0.00
High-tech manufacturing	0.02	0.03	0.01	-0.09
Knowledge intensive services	0.12	0.15	0.11	0.11
TOTAL KI SECTORS	*0.01*	*0.00*	*0.00*	*-0.06*
OTHER SECTORS				
Primary	-0.31	0.00	0.07	-0.44
Manufacturing	0.06	0.24	0.08	0.13
Wholesale and retail distribution	-0.31	-0.24	-0.57	-0.46
Construction and utilities	0.38	0.46	0.59	0.64
Transport and travel	-0.04	0.05	0.13	0.13
Property and finance	0.01	-0.10	0.04	-0.13
Other business services	0.15	0.13	0.31	0.38
Other services	-0.05	-0.27	-0.09	-0.45
Education, arts, charities, social care	-0.06	0.04	-0.64	0.18
TOTAL NON-KI SECTORS	*-0.02*	*-0.02*	*-0.01*	*0.03*

Insofar as the six years to 2016-17 are concerned, relative concentration in terms of employment has increased in a number of key sectors, namely Construction and Utilities (0.46) and Manufacturing (0.24). Other non-KI sectors that appear to have gained more prominence over time are Other Business Services (0.13), Transport and Travel (0.05), and Education, Arts, Charities, Social Care (0.04). The concentration of employment in the area has remained somewhat stable for the KI sectors taken together, with only the Knowledge Intensive Services sector experiencing a relatively large change in employment LQs over time.

Similar to the results for employment, the degree of concentration based on turnover has increased for Construction and Utilities (0.64), Other Business Services (0.38), Education, Arts, Charities, Social Care (0.18), Manufacturing (0.13), and Transport and Travel (0.13). A significant decline in concentration is found for the Wholesale and Retail Distribution sector (-0.46) and for the Primary sector (-0.44), although the turnover LQs for these sectors are still the highest in the district. Among KI sectors, concentration has increased noticeably only for Knowledge Intensive Services.

Table 12 shows the annualised growth rates in employment by firm size over the three- and six-year periods to 2016-17. A detailed disaggregation of the figures presented below is included in Table A.9.

Table 12 Three-year and six-year employment growth (% pa) by firm size – Broad summary

	Fenland		Combined Authority	
	3 years to 2016-17	6 years to 2016-17	3 years to 2016-17	6 years to 2016-17
Micro firms	5.5%	5.6%	6.6%	6.4%
Small and medium-sized firms	6.1%	7.8%	5.1%	5.7%
Large firms	-2.7%	3.3%	7.4%	6.2%
All firms in area	4.4%	6.3%	6.4%	6.0%

Total employment growth in Fenland is largely influenced by SMEs, which have exhibited the highest rates of growth in the district (6.1% over the three years to 2016-17 and 7.8% over the six years to 2016-17). Importantly, employment at SMEs that are based in Fenland has grown at a faster rate compared to the Combined Authority (7.8% and 5.7%, respectively, if the six-year window is examined). Micro firms have grown at a 5.6% rate (as opposed to 6.4% for the Combined Authority), whereas more limited growth is shown by firms with more than 250 employees (3.3%).

Table 13 shows the annualised growth rates in turnover by firm size over the three- and six-year periods to 2016-17. A detailed disaggregation of the figures presented below is included in Table A.10.

Table 13 Three-year and six-year turnover growth (% pa) by firm size – Broad summary

	Fenland		Combined Authority	
	3 years to 2016-17	6 years to 2016-17	3 years to 2016-17	6 years to 2016-17
Micro firms	7.5%	6.7%	10.2%	8.2%
Small and medium-sized firms	-3.3%	2.8%	6.1%	4.0%
Large firms	7.2%	7.8%	6.4%	7.6%
All firms in area	1.4%	4.8%	6.9%	6.5%

Throughout the entire period, the highest rates of growth in turnover are reported for large firms, which have been growing at a rate similar to that of the Combined Authority (7.8% and 7.6%, respectively). Significant growth has also characterised micro firms (6.7%), although turnover for this group of firms in Fenland has increased to a lesser extent compared to the Combined Authority (8.2%). The lowest rates of growth are found among SMEs, which have been growing by 2.8% (as opposed to 4.0% for the whole region).

Centre for Business Research

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Appendix A

Table A.1 Distribution of number of companies by sector in 2016-17

	Fenland			Combined Authority	
	No. of companies	% of total	% of Combined Authority	No. of companies	% of total
KNOWLEDGE INTENSIVE SECTORS					
Information Technology and Telecoms	129	6.5%	4.6%	2,805	11.4%
Life science and healthcare	2	0.1%	0.5%	384	1.6%
High-tech manufacturing	38	1.9%	7.2%	526	2.1%
Knowledge intensive services	34	1.7%	4.8%	712	2.9%
TOTAL KI SECTORS	*203*	*10.2%*	*4.6%*	*4,427*	*18.0%*
OTHER SECTORS					
Primary	115	5.8%	17.5%	657	2.7%
Manufacturing	128	6.4%	10.9%	1,174	4.8%
Wholesale and retail distribution	279	14.0%	11.3%	2,468	10.0%
Construction and utilities	415	20.9%	14.1%	2,952	12.0%
Transport and travel	103	5.2%	11.5%	895	3.6%
Property and finance	177	8.9%	5.9%	2,991	12.2%
Other business services	248	12.5%	5.3%	4,720	19.2%
Other services	249	12.5%	8.2%	3,039	12.4%
Education, arts, charities, social care	69	3.5%	5.6%	1,238	5.0%
TOTAL NON-KI SECTORS	*1,783*	*89.8%*	*8.9%*	*20,134*	*82.0%*
TOTAL ALL SECTORS	*1,986*	*100.0%*	*8.1%*	*24,561*	*100.0%*

Table A.2 Employment location quotients in 2016 – BRES data

	LQ (Comb. Auth. = 1)	LQ (LEP = 1)	LQ (GB = 1)
High-tech manufacturing	0.59	0.60	0.78
Life sciences manufacturing	0.00	0.00	0.00
ICT	0.17	0.22	0.20
R&D	0.01	0.02	0.06
Knowledge intensive services	0.45	0.54	0.63
Sub-total - KI sectors	*0.29*	*0.36*	*0.45*
Primary	6.83	5.64	1.02
Other manufacturing	2.82	2.13	2.89
Property and construction	1.18	0.99	0.99
Utilities	0.75	0.77	0.76
Publishing	0.29	0.41	0.73
Transport and travel	1.59	1.35	1.55
Wholesale distribution	1.54	1.32	1.57
Retail distribution	0.99	0.95	0.99
Hotels, pubs and restaurants	0.83	0.70	0.63
Other business services	1.00	1.05	1.02
Public services	1.04	1.10	0.83
Other Services	0.71	0.71	0.70
Education	0.84	0.95	1.03
Finance and professional services	0.64	0.69	0.43
Health services	0.86	0.89	0.79
Sub-total - Other sectors	*1.12*	*1.08*	*1.06*

Table A.3 Comparison of employment by sector in 2016 – Cambridge Ahead vs. BRES data

	Total employment		% of total	
	Cambridge Ahead data	BRES data	Cambridge Ahead data	BRES data
High-tech manufacturing	489	640	4.1%	1.8%
Life sciences manufacturing	0	0	0.0%	0.0%
ICT	222	265	1.8%	0.8%
R&D	33	10	0.3%	0.0%
Knowledge intensive services	178	525	1.5%	1.5%
Sub-total - KI sectors	*922*	*1,440*	*7.6%*	*4.1%*
Primary	2,482	625	20.6%	1.8%
Other manufacturing	1,600	5,350	13.3%	15.4%
Property and construction	1,556	2,225	12.9%	6.4%
Utilities	200	485	1.7%	1.4%
Publishing	13	100	0.1%	0.3%
Transport and travel	836	3,225	6.9%	9.3%
Wholesale distribution	1,370	2,125	11.3%	6.1%
Retail distribution	362	3,385	3.0%	9.7%
Hotels, pubs and restaurants	388	1,620	3.2%	4.7%
Other business services	892	4,510	7.4%	13.0%
Public services	4	1,200	0.0%	3.4%
Other Services	384	1,140	3.2%	3.3%
Education	797	3,070	6.6%	8.8%
Finance and professional services	106	720	0.9%	2.1%
Health services	162	3,575	1.3%	10.3%
Sub-total - Other sectors	*11,152*	*33,355*	*92.4%*	*95.9%*
Total Employment	*12,074*	*34,795*	*100.0%*	*100.0%*

Note: For a detailed comparison of employment estimates between Cambridge Ahead data and BRES data, please see the report titled “Comparison of the employment growth from the corporate database with BRES data”.

Table A.4 Distribution of number of companies by firm size in 2016-17 – Detailed summary

	Fenland		Combined Authority	
	No. of companies	%	No. of companies	%
Micro firms				
1 employee	940	47.3%	11,662	47.5%
2-4 employees	678	34.1%	8,369	34.1%
5-9 employees	177	8.9%	2,183	8.9%
Small firms				
10-49 employees	159	8.0%	1,848	7.5%
Medium-sized firms				
50-99 employees	13	0.7%	189	0.8%
100-249 employees	16	0.8%	187	0.8%
Large firms				
> 250 employees	3	0.2%	123	0.5%
All firms in area	*1,986*	*100.0%*	*24,561*	*100.0%*

Table A.5 Distribution of employment by firm size in 2016-17 – Detailed summary

	Fenland		Combined Authority	
	Total employment	%	Total employment	%
Micro firms				
1 employee	940	7.8%	11,662	4.9%
2-4 employees	1,675	13.9%	21,260	9.0%
5-9 employees	1,106	9.2%	13,815	5.8%
Small firms				
10-49 employees	3,161	26.2%	37,818	16.0%
Medium-sized firms				
50-99 employees	936	7.8%	13,451	5.7%
100-249 employees	2,419	20.0%	29,230	12.4%
Large firms				
> 250 employees	1,837	15.2%	109,110	46.2%
All firms in area	*12,074*	*100.0%*	*236,346*	*100.0%*

Table A.6 Distribution of turnover by firm size in 2016-17 – Detailed summary

	Fenland		Combined Authority	
	Total turnover £,000	%	Total turnover £,000	%
Micro firms				
1 employee	164,878	7.8%	1,642,977	3.6%
2-4 employees	277,468	13.1%	3,442,876	7.6%
5-9 employees	180,523	8.6%	2,620,334	5.8%
Small firms				
10-49 employees	621,377	29.4%	6,854,090	15.1%
Medium-sized firms				
50-99 employees	132,115	6.3%	2,100,819	4.6%
100-249 employees	307,998	14.6%	4,581,570	10.1%
Large firms				
> 250 employees	425,997	20.2%	24,019,107	53.1%
All firms in area	*2,110,357*	*100.0%*	*45,261,773*	*100.0%*

Table A.7 Change in employment location quotients – BRES data

	3yrs 2013-2016			6yrs 2010-2016		
	Comb. Auth. = 1	LEP = 1	GB = 1	Comb. Auth. = 1	LEP = 1	GB = 1
High-tech manufacturing	0.23	0.21	0.19	0.21	0.19	0.10
Life sciences manufacturing	0.00	0.00	0.00	-1.03	-1.45	-1.66
ICT	-0.02	-0.02	-0.03	-0.02	-0.02	0.01
R&D	-0.02	-0.04	-0.17	-0.04	-0.07	-0.27
Knowledge intensive services	0.02	0.00	0.02	-0.08	-0.12	-0.24
Sub-total - KI sectors	*0.04*	*0.04*	*0.04*	*-0.04*	*-0.05*	*-0.10*
Primary	1.22	0.49	0.16	0.69	-0.58	0.12
Other manufacturing	0.01	-0.04	-0.06	-0.28	-0.19	-0.10
Property and construction	-0.06	-0.10	-0.06	-0.06	-0.12	-0.19
Utilities	0.07	0.08	0.01	0.31	0.23	0.05
Publishing	0.11	0.16	0.39	0.03	0.03	0.24
Transport and travel	-0.01	0.01	0.13	0.02	0.08	0.22
Wholesale distribution	-0.22	-0.16	-0.20	0.05	-0.03	-0.21
Retail distribution	-0.01	0.00	0.01	-0.23	-0.18	-0.13
Hotels, pubs and restaurants	0.18	0.14	0.11	0.11	0.11	0.11
Other business services	-0.05	-0.04	-0.10	-0.05	-0.03	0.03
Public services	-0.16	-0.17	-0.10	-0.33	-0.31	-0.28
Other Services	-0.02	0.01	0.13	-0.07	-0.04	-0.04
Education	0.07	0.09	0.03	0.36	0.43	0.45
Finance and professional services	0.00	0.01	0.02	0.07	0.04	0.06
Health services	-0.02	-0.02	-0.02	0.03	0.05	0.02
Sub-total - Other sectors	*-0.01*	*-0.01*	*0.00*	*0.00*	*0.01*	*0.01*

Table A.8 Comparison of employment growth by sector – Cambridge Ahead vs. BRES data

	3yrs 2013-2016		6yrs 2010-2016	
	Cambridge Ahead data	BRES data	Cambridge Ahead data	BRES data
High-tech manufacturing	0.9%	9.3%	3.1%	3.7%
Life sciences manufacturing	0.0%	0.0%	0.0%	-100.0%
ICT	3.9%	0.6%	4.9%	6.2%
R&D	67.7%	-30.7%	42.1%	-22.2%
Knowledge intensive services	11.0%	9.5%	13.6%	0.8%
Sub-total - KI sectors	*4.4%*	*6.9%*	*5.7%*	*0.5%*
Primary	1.2%	7.0%	5.2%	2.8%
Other manufacturing	4.0%	1.3%	6.3%	1.1%
Property and construction	12.4%	0.8%	9.2%	-0.2%
Utilities	16.3%	1.8%	24.4%	2.2%
Publishing	9.1%	26.0%	6.3%	4.9%
Transport and travel	9.0%	8.1%	7.8%	7.0%
Wholesale distribution	-5.0%	-2.5%	-0.1%	-0.3%
Retail distribution	7.1%	0.9%	7.9%	-0.9%
Hotels, pubs and restaurants	6.0%	11.6%	4.6%	8.0%
Other business services	12.1%	2.1%	7.9%	5.8%
Public services	58.7%	-5.0%	0.0%	-6.5%
Other Services	2.7%	9.6%	4.8%	1.5%
Education	7.9%	1.8%	23.6%	11.8%
Finance and professional services	20.2%	3.5%	9.1%	4.4%
Health services	-7.5%	0.9%	-2.2%	3.1%
Sub-total - Other sectors	*4.4%*	*2.3%*	*6.4%*	*2.7%*
Total Employment	*4.4%*	*2.4%*	*6.3%*	*2.6%*

Note: For a detailed comparison of employment growth rates between Cambridge Ahead data and BRES data, please see the report titled "Comparison of the employment growth from the corporate database with BRES data".

Table A.9 Three-year and six-year employment growth (% pa) by firm size – Detailed summary

	Fenland		Combined Authority	
	3 years to 2016-17	6 years to 2016-17	3 years to 2016-17	6 years to 2016-17
Micro firms				
1 employee	-1.3%	2.4%	-2.2%	1.8%
2-4 employees	10.0%	8.1%	10.1%	9.9%
5-9 employees	5.9%	5.1%	10.7%	6.1%
Small firms				
10-49 employees	11.2%	10.3%	9.6%	6.7%
Medium-sized firms				
50-99 employees	1.8%	-0.4%	-2.2%	1.4%
100-249 employees	2.2%	8.9%	3.7%	6.6%
Large firms				
> 250 employees	-2.7%	3.3%	7.4%	6.2%
All firms in area	*4.4%*	*6.3%*	*6.4%*	*6.0%*

Table A.10 Three-year and six-year turnover growth (% pa) by firm size – Detailed summary

	Fenland		Combined Authority	
	3 years to 2016-17	6 years to 2016-17	3 years to 2016-17	6 years to 2016-17
Micro firms				
1 employee	2.3%	4.2%	-1.7%	1.3%
2-4 employees	13.5%	9.1%	12.3%	11.1%
5-9 employees	4.8%	5.9%	17.9%	10.3%
Small firms				
10-49 employees	8.8%	10.0%	12.1%	8.3%
Medium-sized firms				
50-99 employees	-4.9%	-4.4%	-6.6%	-7.2%
100-249 employees	-17.0%	-3.2%	5.7%	6.3%
Large firms				
> 250 employees	7.2%	7.8%	6.4%	7.6%
All firms in area	*1.4%*	*4.8%*	*6.9%*	*6.5%*