

REGIONAL MANUFACTURING OUTLOOK 2025



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In partnership with



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Foreword



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Last year marked a decade since the inaugural publication of the Regional Outlook report, which coincided with a General Election. Since then, manufacturers have dealt with a plethora of challenges, whilst maintaining a positive outlook on the future – exemplified by the survey's measure of confidence. This latest instalment marks Make UK and BDO's 11th annual review of manufacturing activity across UK regions and nations.

It's safe to say things have not been quiet since the election. Domestically, the Autumn Budget of 2024 took bold steps to fill a financial black hole in the Treasury's vault whilst outlining actions to increase employment security. This included raising both the National Minimum Wage and employers' National Insurance contributions, leading to a sharp increase in business costs. Manufacturers highlighted to us that they would respond swiftly to protect their businesses, through increasing prices, reducing hiring and limiting wage rises. What the industry has not done is substantially cut its workforce, given the historical challenge with labour shortages.

Beyond our national boundaries, the US saw President Trump return and take unprecedented action to bring economic prosperity back to their nation, primarily through tariffs on imports. These blanket tariffs, coupled with more substantial tariffs on specific goods such as cars, caused significant uncertainty for UK manufacturers. It was expected that demand from our second-largest trading partner after the European Union (EU) would fall, and our GDP growth would take a hit. Our quarterly survey revealed recently that UK manufacturers are already trading less with US businesses. Fortunately, the UK Government's deal with the US has returned certainty back to businesses but additional work is still needed here.

The good news is that the pendulum is about to swing in our favour following the unveiling of the long-term Industrial Strategy. Make UK have been calling for this long-term plan and commitment to industry for over a decade now, and the UK Government has finally done just that. This plan spotlights eight key sectors, including Advanced Manufacturing, which form the foundations of achieving long-term economic success through industry.

As a result of novel challenges and opportunities, manufacturing activity by location has been mixed, albeit the good certainly outweighs the bad in our review. All regions and nations reported growth in their output in the last twelve months, except for Scotland. Similarly, most areas reported a boost in their order books too, the South West has stood out, performing best in the UK for output and orders – an example of the benefits of publicly supporting industries like aerospace and defence manufacturing which dominate the region. The growth in investment intentions is led by the North West, helping solidify the region's place as a manufacturing powerhouse. The East of England reported the most improved sentiment for investment in capital, indicating a boost in confidence has translated into an increase in risk-taking. However, in the North East, growth has been more sluggish due to weak employment growth, and output and orders fell below the performance of last year.

Overall, despite the impact of economic disruption, UK manufacturers across the nation are doing well and are positively looking towards the future, by focusing on the actions that will make a difference – investing in sustainability, digital solutions like AI and upskilling the future workforce.

The new Industrial Strategy will play a major role in shaping those investment decisions at the firm level. The Government has done right by focusing on supporting the cost of energy for industry, coupled with increasing support for skills and access to finance. Now is the time to put this plan into action and, if done well, industry will back it wholeheartedly through proactive investment in our future.

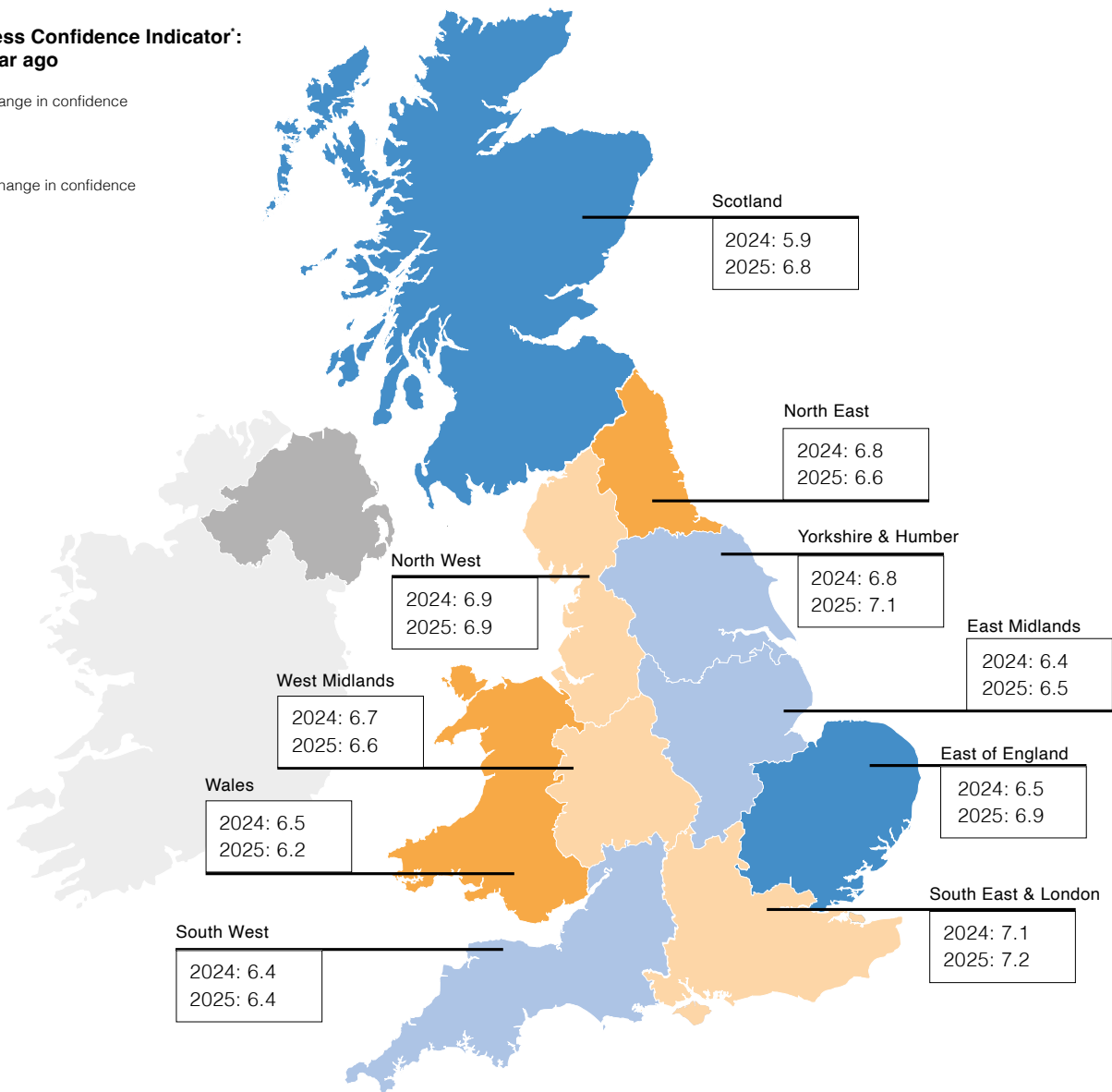
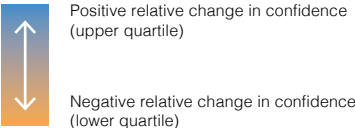
Regional Snapshot

This year’s edition of *Regional Manufacturing Outlook* shows mostly positive results for all regions and nations in the UK covered by the research.

Despite general positivity across the board, there remains a wide amount of variance across the UK’s geographies, variance that often is characterised by the dominant manufacturing subsectors contained within given regions and the success of those industries over the past year. Despite a handful of negative metrics seen by some regions

and nations, where negativity exists, it has largely been limited to a modest degree. The South West region has emerged as the most performant region over this research period across the core metrics by quite some margin, bouncing back from a more troubled performance the year before.

Difference in Business Confidence Indicator*: compared to one year ago



*Business Confidence Indicator: Manufacturer's confidence about their own business performance in the next twelve months
Map coloured to show the relative change in average confidence between 2022q3/2023q2 and 2023q3/2024q2

How do the regions/ nations compare?

This edition of *Regional Manufacturing Outlook*, in partnership with BDO, covers a four-quarter period where the strong majority of data showed positivity on average across the year. Interestingly, those regions which have exhibited the strongest output and orders growth have not been the same regions which have signalled the strongest intentions to invest in the coming year. Likewise, those regions and nations that reported the highest manufacturing business confidence are not necessarily those which showed the greatest growth performance over the past year.

What these variances reveal is the nuanced outlook for the regions covered in this research. Set against the backdrop of the UK Government's recently announced Industrial Strategy, certain manufacturing subsectors are poised for greater focus in the UK's economy in the coming years, so the subsector composition of a region's economy will play an even greater role in its future prospects.

The region that outperformed all others across the core metrics of output and orders this year was the South West. Posting year-average balances for output and orders of +24% and +23% respectively, the region has garnered three accolades in the research for this showing. Not only holding the highest average balance for both metrics, in the case of orders, it also showed the greatest improvement compared to all other regions and nations this year. This has been quite the turnaround for a region that had a decidedly pedestrian performance in the 2024 edition of this research. However, despite strong balances across those core metrics, investment intentions and employment did not fare anywhere near as strongly. Most interestingly, this was

one of only two regions and nations within the research that showed negative year-average figures for investment intentions, particularly interesting when juxtaposed against the region's growth performance in the same period.

Rather, the strongest investment intentions for the year ahead emerged from the North West, which, despite showing diminutive output growth over the research period, consistently showed strength in the sector's commitment to capital expenditure in the future. There's little doubt that its dominant manufacturing subsector, the Transport Equipment subsector, accounting for 24% of all manufacturing in the region, has been the driving force of these intentions.

The poorest performance has been observed in the nation of Scotland, where average balances for the year for output and orders aggregated to -4% and -7% respectively. Despite this pack-bottoming performance on a relative scale, the absolute negativity of these figures is quite modest. Counterintuitively, it is somewhat of a positive sign that the worst-performing region or nation of the pack achieves so with such mild negativity across the year.

The overwhelming majority of regions and nations saw employment performance remain within single-digit territory for their year-averages, reflecting the limited growth seen in the UK's manufacturing employment. Of all metrics, this is one of the least variable, revealing the commonality across UK regions and nations in both the challenge of acquiring the right skills and the wider demand conditions for manufacturing labour consistently across the country.

Regional summary % average balance of change 2024 Q3 - 2025 Q2

	Output	Orders	Investment	Employment
East Midlands	1	-1	-9	-5
East of England	22 ↑	9	27 ↑	3
North East	15 ↓	9 ↓	20	-6 ↓
North West	5	18	28	2
South East & London	15	12	25	2
South West	24	23 ↑	-4	6
West Midlands	13	7	15	10
Yorks & Humber	19	12	14	10 ↑
Scotland	-4	-7	9	1
Wales	21	17	7 ↓	14

Top Performer

Bottom Performer

↑ Improved most compared with last year

↓ Worsened most compared with last year

Source: Make UK Manufacturing Outlook Survey

East Midlands

The East Midlands is the UK's eighth-largest region in terms of gross value add (GVA). The East Midlands economy accounts for 5.7% of the UK's total output, whilst its manufacturing sector accounts for 0.8% of the UK's total output. However, 14.8% of the East Midlands total output is accounted for by manufacturing. Just under half of the region's manufacturing output comes from three subsectors. The largest is the Food & Drink industry, with 19.9% of all manufacturing output. This is followed by Transport Equipment at 13.7%, and then the Metal Products subsector at 12.8%.

	% UK output	% Regional output
Total GVA	5.7%	–
Manufacturing	0.8%	14.8%
Construction	0.4%	7.9%
Services	4.1%	72.7%
Other production	1.1%	19.4%

Source: ONS 2025

Employment

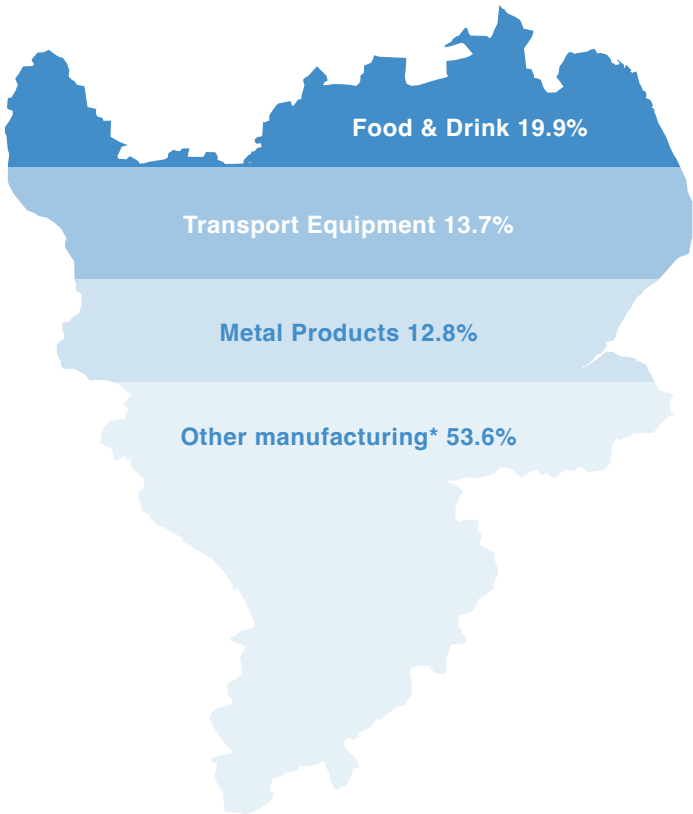
- There were 261,000 manufacturing jobs in the East Midlands in 2025, accounting for 11% of the region's total workforce and 0.7% of the UK total workforce.
- This is a decrease of 12,000 in the last 12 months.

Exports

- East Midlands accounts for 7% of the UK's total goods exports.
- The region's dependence on the EU for exports has increased from 42% to 43% of exported goods journeying to the EU annually.
- The next largest destination for East Midlands's goods is Asia & Oceania, accounting for 30% of goods exports. Followed by North America which accounts for 15% of goods exports.

Productivity

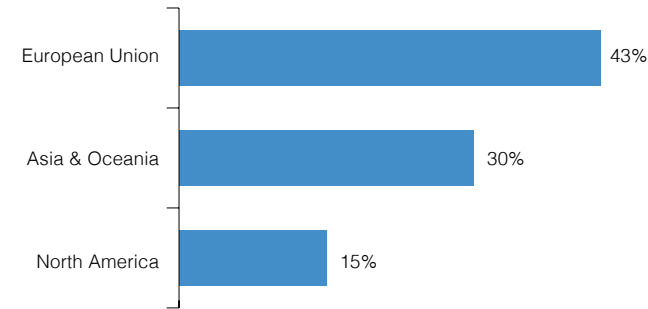
- The East Midlands's overall productivity is the 8th best in the UK, at 85.1% (UK=100)¹.
- Manufacturing productivity is at 91.4% of the UK average, ranking 9th across all regions and nations.



*The sum of subsectors not included in the top 3

Top three export markets for East Midlands goods

% of total trade



Source: Uktradeinfo 2025

¹Due to the ONS no longer publishing statistics for GVA per hour broken down by region/industry since 2020 we have adjusted the methodology to represent productivity as "GVA per job".

Manufacturing Performance in the East Midlands

The East Midlands' manufacturing output performance has generally tracked that of the UK average; however, the earliest quarter of the year's research window shows that the region significantly underperformed relative to the average. The proceeding three quarters tracked the UK average much

more closely, albeit still performing beneath the average for three out of the four quarters in the research window. Orders performance, on the other hand, has seen much greater volatility. The only quarter where orders performance coalesced was in the final quarter of the research, 2025 Q2.

Output beneath UK average but tracking relatively closely.

High variance in orders performance against the average.

Investment intentions the lowest performer in the UK

Employment balance modestly negative

Average business confidence 8th highest in the UK

In the previous edition of *Regional Outlook*, the East Midlands saw flat averages for its output and orders performance over the year. Now, in this latest edition, the region has performed the same feat, posting extremely flat figures for both output and orders of the year, making it the most steady, in terms of 'no-change' with regards to its core metric performance.

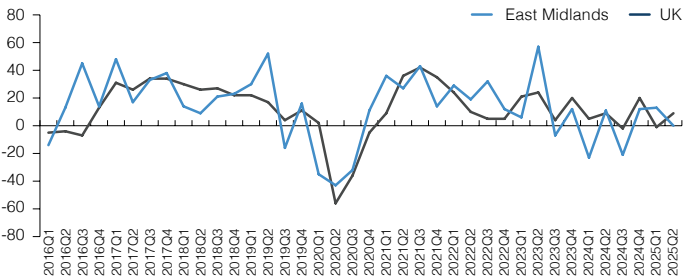
Between the research window of Q3 2024 and Q2 2025, the average output balance figure was 1% and the average orders balance figure was -1%. This is an exceptionally flat performance, and even more so than what was seen in the last edition of this report. This 'flatness' should not be interpreted as negativity, nevertheless, relative to other regions and nations within *Regional Outlook*, the East Midlands is the second least performant across orders and output.

Two of the largest manufacturing subsectors within the region are Food & Drink and Metal Products. Performance

of these subsectors will be a significant determinant for the region's wider manufacturing performance. Even on a national scale, these subsectors have seen relatively diminutive growth over the past year, and in the case of Basic Metals (included within Metal Products), a more significant contraction in output.

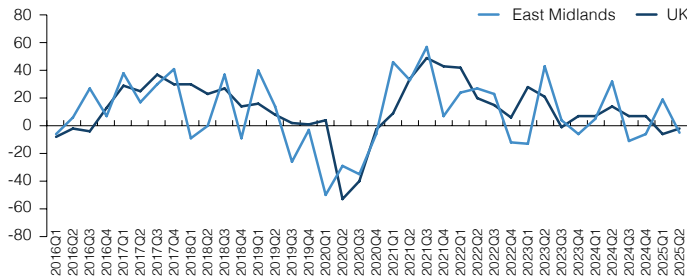
Last year, the East Midlands had the eighth highest manufacturing business confidence in the UK, a position which the region reprises once again, but this time sees a marginal improvement in the actual confidence score. Having previously stood at 6.4 last year, the latest research shows the business confidence score has now moved up slightly to 6.5. Last year saw greater growth, but the region will be encouraged by seeing its positivity in outlook retained despite pedestrian performance across the core metrics of output and orders. The region's confidence score is only marginally behind that of the national average, which stands at 6.7.

East Midlands' output balances underperformed the UK average in the final quarter
% balance of change in output (past 3 months)



Source: Make UK Manufacturing Outlook Survey

East Midlands' orders balances indicate substantial volatility
% balance of change in orders (past 3 months)



Source: Make UK Manufacturing Outlook Survey

East of England

The East of England is the UK's third largest region in terms of gross value add (GVA) and the fourth largest manufacturing sector. The East of England economy accounts for 8.3% of the UK's total output, whilst its manufacturing sector accounts for 0.9% of the UK's total output. The manufacturing sector accounts for 10.7% of the region's total output, above the UK average of 9.1%. The region's largest three manufacturing subsectors are the Pharmaceuticals subsector (15.2%), Food & Drink industry (13.5%) and Machinery Equipment (11.6%) combined. Out of all regions and nations in the UK, the East of England has the largest proportion of its manufacturing made up of subsectors not included in the top three, highlighting the diverse manufacturing subsector base that the region plays host to.

	% UK output	% Regional output
Total GVA	8.3%	–
Manufacturing	0.9%	10.7%
Construction	0.8%	9.4%
Services	6.3%	76.2%
Other production	1.2%	14.4%

Source: ONS 2025

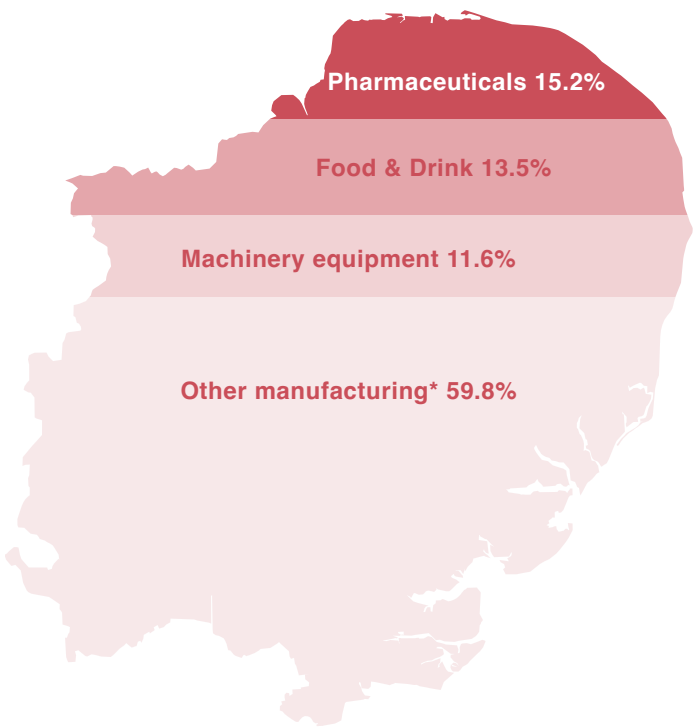
Employment

- There are 228,000 manufacturing jobs in the East of England, accounting for 7% of the region's total workforce and 0.6% of the UK's total workforce.
- This is an increase of 9,000 in the last 12 months.

Exports

- The East of England accounts for 9% of the UK's total goods exports.
- The region's sees 49% of its exported goods journeying to the European Union annually. This is one percentage point below the UK average (50%).
- The next largest destination for East of England's goods is North America, accounting for 22% of goods exports. Followed by Asia & Oceania which accounts for 14% of goods exports.

²Due to the ONS no longer publishing statistics for GVA per hour broken down by region/industry since 2020 we have adjusted the methodology to represent productivity as "GVA per job".

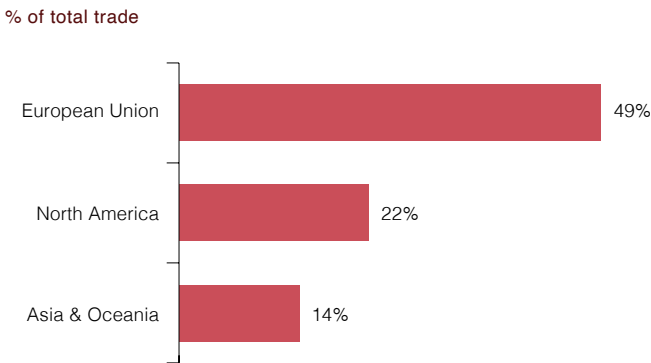


*The sum of subsectors not included in the top 3

Productivity

- The East of England's overall productivity is the 3rd best in the UK, at 92.5% of average (UK=100)².
- Manufacturing productivity is at 111.1% of the UK average, ranking 1st across all regions and nations, having previously been 2nd last year.

Top three export markets for East of England goods



Source: Uktradeinfo 2025

Manufacturing Performance in the East of England

The East of England, having followed the performance of the wider national average for the first half of the research window, massively outperformed in the second half of the year for output. Output performance went from strength to strength, posting a staggering +44% balance figure in 2025

Q2, which dragged the region's year performance average up significantly. However, the same can't be said for orders, which saw a far more typical performance. Nevertheless, orders performance outperformed the national average on three out of four occasions across the research window.

Output performance explodes in the second half of the year, dragging up the average

Orders slightly outperform the national average

Investment intentions 2nd most positive in the UK, most improved relative to last year

Employment growth diminutive and can be considered flat

Average business confidence 3rd highest in the UK

The East of England has seen its annual performance consistently improve over the past three years. Two years ago, the region posted some of the worst figures for output and orders, then in the year following, the sector posted an improved but mixed bag. Now, in 2025 in the latest report, the region posted one of the best year-averages for output performance, whilst also earning the accolade of most improved output performance when compared to last year. Orders performance isn't as glamorous, but remains in moderate positivity on average across the year.

The region's year-average balance figure for output came in at +22%, only two percentage points beneath the most performant region in the UK, the South West. The year-average balance figure for orders performance reported at +9%, which places the region somewhere in the middle of the pack in terms of relative performance compared to all other UK regions and nations.

Perhaps even more encouraging than the seismic growth in output is the positivity seen in investment intentions. The year-average figure for investment intentions stands at +27%, which makes it the second highest investment score out of all regions and nations and only one percentage point behind the highest. Also, similar to the region's output performance, the East of England's investment intentions performance is the most improved across the UK relative to last year.

Employment performance, however, is more pedestrian, with an average balance figure of +3% reported. This is quite close to a flat, or 'no change', average across the year. Business confidence, as one might expect following such growth in the core performance metrics over the year, has grown in kind. Ranked, the East of England has grown a handful of places to now stand as the third most confident manufacturing region in the UK. Its confidence score reported at 6.9, which is an improvement over the 6.5 reported last year, and above this year's UK average of 6.7.

East of England's production growth far exceeds the UK average in 2025

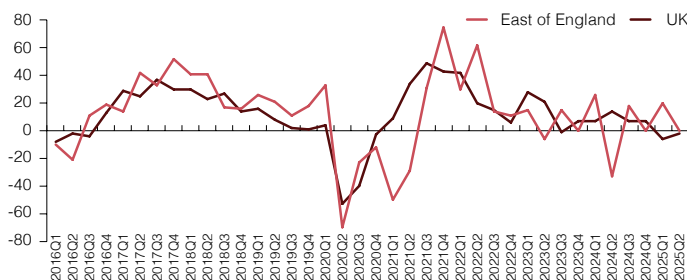
% balance of change in output (past 3 months)



Source: Make UK Manufacturing Outlook Survey

Orders growth less promising despite strong output performance

% balance of change in orders (past 3 months)



Source: Make UK Manufacturing Outlook Survey

North East

The North East is the UK's tenth largest region in terms of gross value add (GVA). The region's manufacturing sector is relatively small accounting for 0.4% of the UK's total output. However, the manufacturing sector is of significant importance to the North East, accounting for 14.1% of its own economic output, above the UK average of 9.1%. The top three subsectors in the region are accounted for by Pharmaceuticals (28.0%), Transport Equipment (17.1%) and Metal Products (10.3%).

	% UK output	% Regional output
Total GVA	2.8%	–
Manufacturing	0.4%	14.1%
Construction	0.2%	7.2%
Services	2.1%	75.5%
Other production	0.5%	17.3%

Source: ONS 2025

Employment

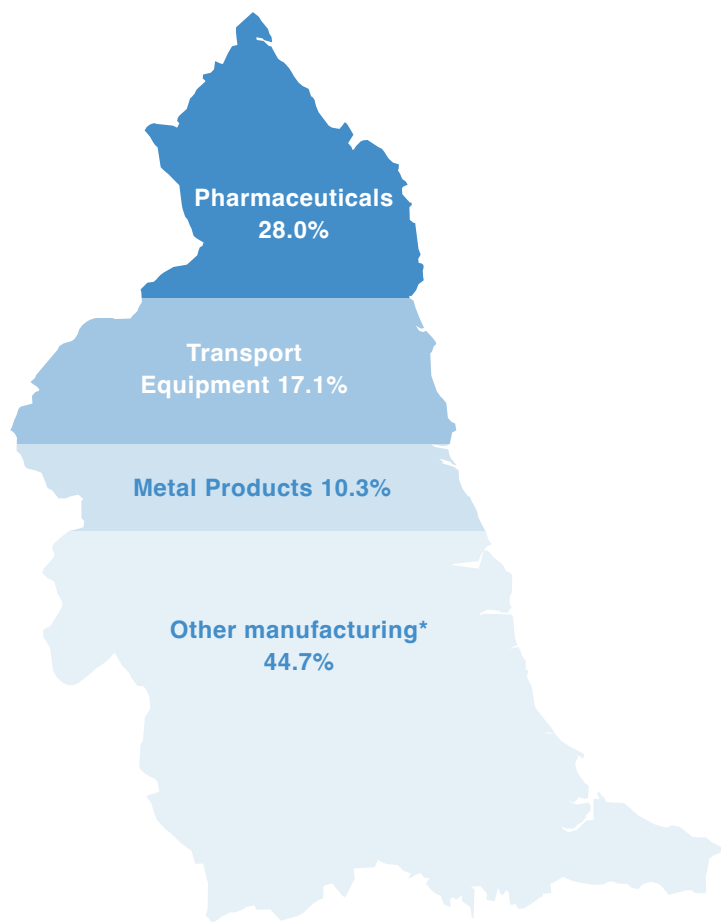
- There are 121,000 manufacturing jobs in the North East, accounting for 10% of the region's total workforce and 0.3% of the UK's total workforce.
- This is an increase of 7,000 in the last 12 months.

Exports

- The North East accounts for 4% of the UK's total goods exports.
- The region maintains a higher than average dependency on the EU for exports, with 53% of exported goods journeying to the EU.
- The next largest destination for North East goods is North America, accounting for 16% of goods exports. Followed by Asia & Oceania which accounts for 13% of goods exports.

Productivity

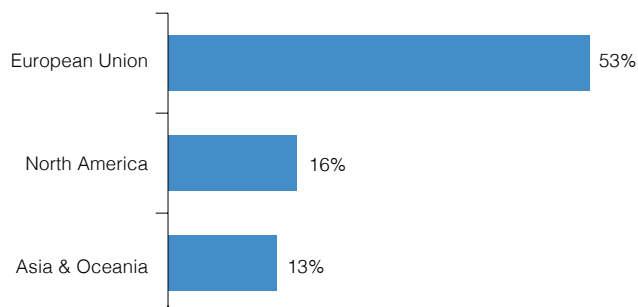
- The North East's overall productivity is the 10th best in the UK, at 82.6% (UK=100)³.
- Manufacturing productivity is at 92.4% of the UK average, ranking 8th across all regions and nations.



*The sum of subsectors not included in the top 3

Top three export markets for North East goods

% of total trade



Source: Uktradeinfo 2025

³Due to the ONS no longer publishing statistics for GVA per hour broken down by region/industry since 2020 we have adjusted the methodology to represent productivity as "GVA per job".

Manufacturing Performance in the North East

Following last year's edition, which saw the North East's core metric performance skyrocket, this year's performance is a more mixed picture. Output only meaningfully exceeded the UK average in one of the four quarters in the research window, however, on that one occasion it did so by a

massive margin. Orders performance saw similar, with a singular quarter of out-performance. While the region's overall performance is a rung below what was observed last year, this time its showing is largely in line with the national average, particularly in the latter two quarters.

Output balance figure above average, but most worsened compared to last year

Orders performance in line with average, but also most worsened compared to last year

Investment intentions strong, almost by a factor of two over the rest of the UK

Employment balance bottom performing and most worsened

6th highest business confidence in UK

The North East has held the highest output year-average balance figure in *Regional Outlook* for three consecutive years, however, now this feat has come to an end. Similar too with orders, which didn't quite see the same highs but have now come down in line with the UK average. Given this exceptional performance in previous years, it follows that the North East's output and orders performance have gained the accolade of 'most worsened' relative to last year, but this is due to starting from a high base. In summary, the average balance for output reported at +15%, three percentage points above the +12% UK average. Orders reported at +9%, in line with the UK average.

The largest determinant in the sector's 'normalised' performance in this year's metrics is the Pharmaceuticals subsector. The Pharmaceutical subsector has gone through a cooling period over the past few years, as the relative growth experienced by it related to pandemic interventions

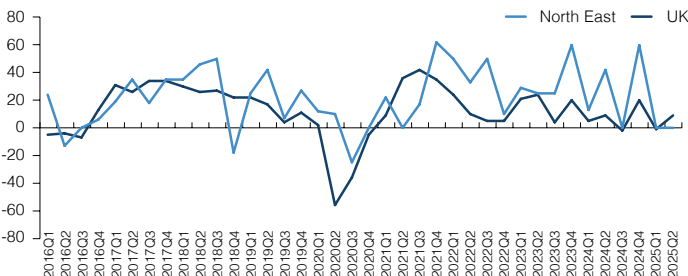
begins to abate. The subsector, on a UK-wide basis, has contracted a little in output across both 2024 and is set to do so again in 2025.

Despite this, investment intentions have performed very well. The average balance figure for this metric reported at +20% for the year, which is almost twice as strong as the UK average. Also driving this will be Pharmaceutical subsector's dominant residence in the sector, as it is a more investment-intensive manufacturing subsector than others. The employment year average balance figure has reported a negative figure for the year, albeit modest at -6%. Nevertheless, this is the lowest average balance figure for employment out of all regions and nations for 2025.

Business confidence remains robust, standing at 6.6 and placing the region sixth out of all UK regions and nations. This is just beneath the UK average business confidence of 6.7.

Output growth oscillated between positive and flat performances

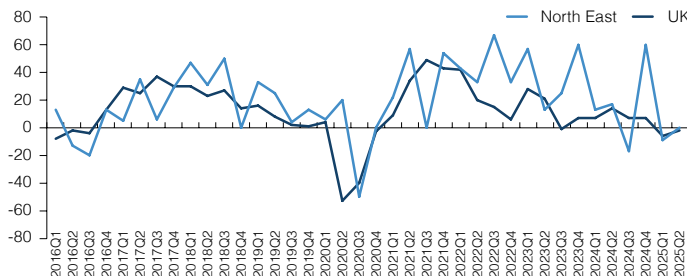
% balance of change in output (past 3 months)



Source: Make UK Manufacturing Outlook Survey

Following a strong end to 2024, orders growth has been generally weak

% balance of change in orders (past 3 months)



Source: Make UK Manufacturing Outlook Survey

North West

The North West is the UK’s second largest region in terms of gross value add (GVA). The entire region makes up almost a tenth of the UK economy (9.9%). The manufacturing sector here accounts for only 1.3% of the total UK output, but 13.0% of the region’s total output, above the UK average of 9.1%. The three subsectors that dominate North West manufacturing include Transport Equipment (23.5%), Food & Drink (13.9%), and Pharmaceuticals (11.6%).

	% UK output	% Regional output
Total GVA	9.9%	–
Manufacturing	1.3%	13.0%
Construction	0.6%	6.5%
Services	7.7%	77.6%
Other production	1.6%	15.9%

Source: ONS 2025

Employment

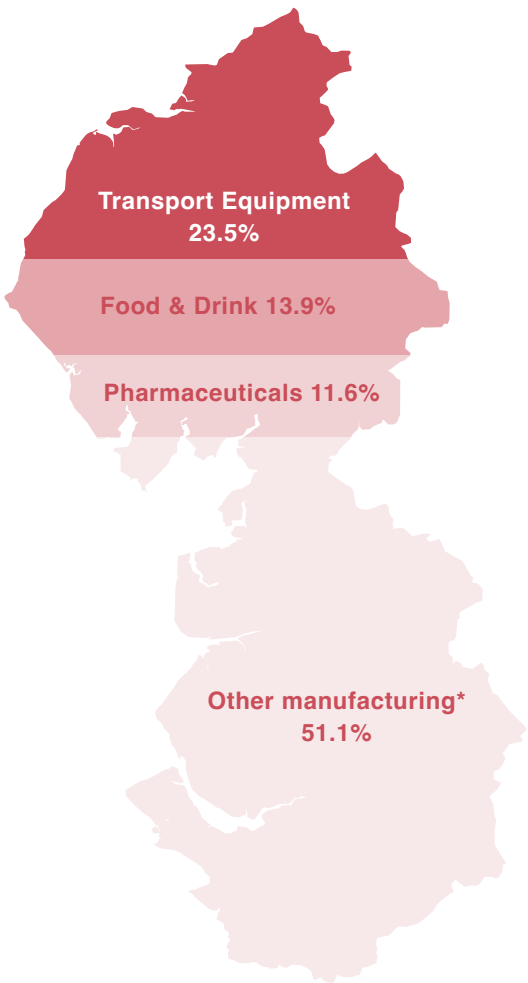
- There are 335,000 manufacturing jobs in the North West, accounting for 8% of the region’s total workforce and 0.9% of the UK’s total workforce.
- This is an increase of 3,000 in the last 12 months.

Exports

- The North West accounts for 9% of the UK’s total goods exports.
- The region exports 50% of its goods to the EU, the same as the national average.
- The next largest destination for the North West’s goods is North America, accounting for 18% of goods exports, followed by Asia & Oceania also at 17%.

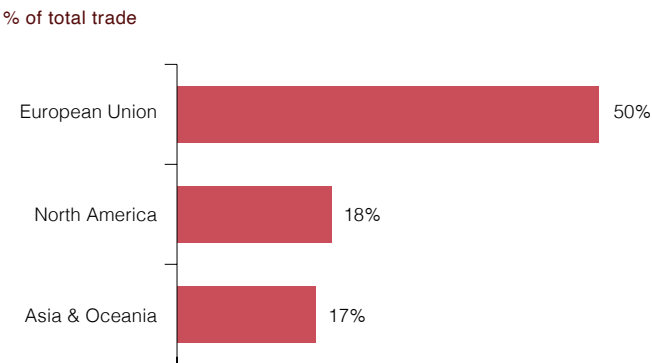
Productivity

- The North West’s overall productivity is the 4th best in the UK, at 91.0% (UK=100)⁴.
- Manufacturing productivity is at 109.0% of the UK average, ranking 2nd across all regions and nations.



*The sum of subsectors not included in the top 3

Top three export markets for North West goods



Source: Uktradeinfo 2025

⁴Due to the ONS no longer publishing statistics for GVA per hour broken down by region/industry since 2020 we have adjusted the methodology to represent productivity as “GVA per job”.

Manufacturing Performance in the North West

The North West has seen core performance over the year start well and finish well over the research period, but underperform the UK average in the intervening quarters. Orders started the year surging ahead of the average but swiftly returned to normality over the following quarters.

Posting all-year performance for output under the UK average but for orders over the average, the main story for the region's prospects is found in its particularly high investment intentions, which are the highest out of all regions and nations.

Output performance positive, but half the scale of the UK average

Orders perform robustly, outpacing the norm

Investment intentions the highest in the UK

Employment growth close to a flat figure over the year

4th highest business confidence

The North West sees an interesting dichotomy of performance across its core performance metrics of output and orders. In the case of output, the year average came in at a positive, albeit diminutive, figure that was just under half as strong as the wider UK average seen across other regions and nations, but in the case of orders the same is true of the inverse. The North West's orders performance over the year reported twice as strong as the UK average.

The year-average balance figure for output came in at +5%, one of the few regions to see a single-digit balance figure for the year. Nevertheless, despite its relatively small size, it remains in positive territory, despite the UK average figure reporting at +12%. The orders balance figure for the year reported at +18%, showing a much stronger performance, and exactly double that of the UK average, which stands at +9%. A stronger year figure for orders is encouraging for the region's future short-term performance as orders work their way through the sector to become output.

Bolstering this optimistic view for the future of the region is its average investment intentions balance figure, which has topped the charts out of all UK regions and nations contained in *Regional Outlook*. The year's investment intentions balance figure reported at +28%, representing a keen confidence in capital expenditure from the manufacturers within the North West to invest over the coming year. Employment was flat for the year, posting a balance figure of +2%.

Manufacturing business confidence in the region is strong, coming in at 6.9. While identical to last year's reported confidence figure, it is 0.2 points higher than the UK average on this occasion, which stands at 6.7.

Output volumes growth exceeded the UK average on balance by the end of Q2 2025

% balance of change in output (past 3 months)



Source: Make UK Manufacturing Outlook Survey

Orders growth strong in 2024, followed by relatively weaker activity this year

% balance of change in orders (past 3 months)



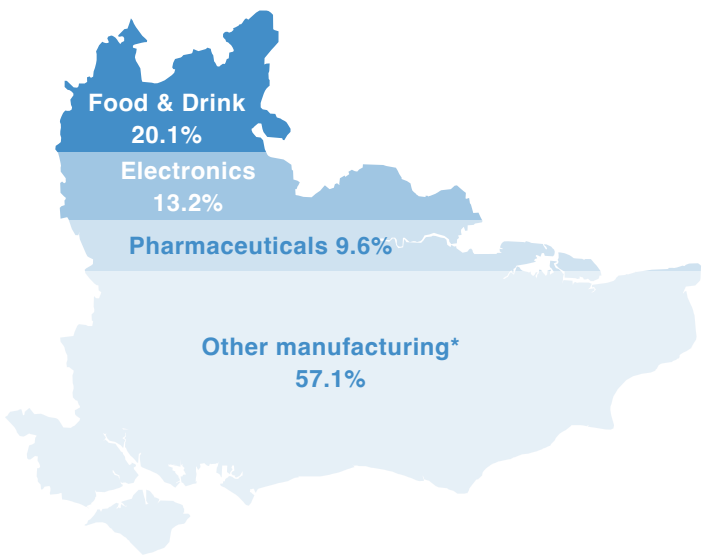
Source: Make UK Manufacturing Outlook Survey

South East & London

The South East and London is the UK's largest region in terms of gross value add (GVA). The region makes up a significant share of the UK economy, accounting for 37.8% of the nation's output. As the region also plays host to the largest share of the service industry as well, the manufacturing sector here accounts for only 4.0% of the region's total output, well below the UK average of 9.1%. The top three manufacturing subsectors here include Food & Drink (20.1%), Electronics (13.2%) and Pharmaceuticals (9.6%). The remaining 57.1% of the manufacturing sector here accounts for all other subsectors.

	% UK output	% Regional output
Total GVA	37.8%	–
Manufacturing	1.5%	4.0%
Construction	1.9%	5.0%
Services	33.6%	88.8%
Other production	2.3%	6.2%

Source: ONS 2025



*The sum of subsectors not included in the top 3

Employment

- There are 419,000 manufacturing jobs in the South East and London, accounting for 4% of the region's total workforce and 1.1% of the UK's total workforce.
- This is an increase of 3,000 in the last 12 months.

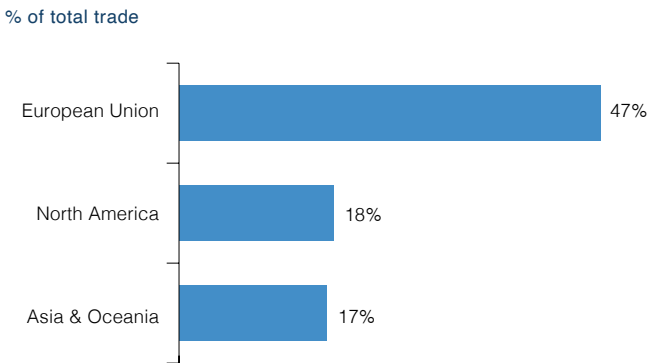
Exports

- The South East & London accounts for 21% of the UK's total goods exports.
- The region exports 47% of its goods to the EU, slightly below the UK average of 50%.
- The next largest destination for South East & London's goods is North America, accounting for 18% of goods exports. Followed by Asia & Oceania which accounts for 17% of goods exports.

Productivity

- The South East & London's overall productivity is the best in the UK, at 121.0% (UK=100)⁵.
- Manufacturing productivity is at 103.3% of the UK average, ranking 5th across all regions and nations.

Top three export markets for South East & London goods



Source: Uktradeinfo 2025

⁵Due to the ONS no longer publishing statistics for GVA per hour broken down by region/industry since 2020 we have adjusted the methodology to represent productivity as "GVA per job".

Manufacturing Performance in the South East & London

Despite the region playing host to a massive services sector by comparison, in absolute terms, the manufacturing sector remains a major employer and value generator. Both output and orders performance over the year has remained near the wider UK average, although outperforming that

average in most individual quarters. The region has exhibited strong investment intentions performance and relatively flat employment balances, but sits roughly middle of the pack, avoiding any 'best' or 'worst' accolades.

Output balance just slightly above the average

Orders similarly just outpace the UK average

3rd strongest investment intentions balance figure

Employment growth flat and in line with the UK trend

Average business confidence highest in the UK

In this year's edition of *Regional Outlook* the South East & London has posted figures largely in the middle of the pack in terms of performance. Both output and orders see themselves report at levels close to the UK average, however, outpacing it slightly in both instances.

The output balance figure for the region reported at +15%, close to but just above the UK average figure of +12%. Orders does likewise, with the balance figure for this metric reporting at +12%, above the UK average of +9%. Over the individual quarters of the research year, orders performance was particularly strong compared to the UK average in the first half of the research window.

This relative stability in the region's performance will be contributed to by its largest manufacturing subsector, the Food & Drink subsector. The relatively stable demand seen for this subsector's products, relative to other subsectors,

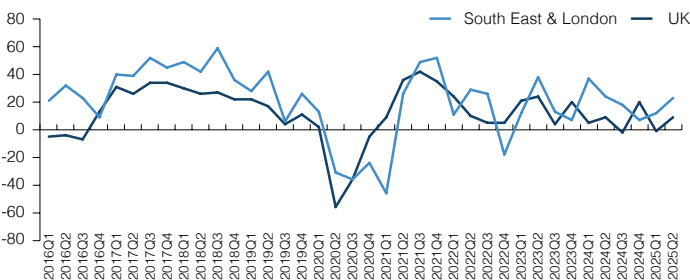
drives this region's down-the-middle performance this year, shielding it from some of the volatility endured by other UK regions and nations due to their subsector composition.

The biggest break from the average is seen in the region's year-ahead investment intentions, which are strong. The investment intentions balance figure reported at +25% for the year, which is over twice as strong as the already positive UK average of +12%. Employment performance is flat, which has been observed across many regions and nations in the UK, with the region's balance figure for the year reporting at just +2%, below the average of +4%.

Manufacturing business confidence in the region is exceptionally robust, holding the highest confidence score out of all regions and nations, standing at 7.2. This is a 0.1 improvement over last year's 7.1.

Output balance outperformed the UK average in the first two quarters of 2025

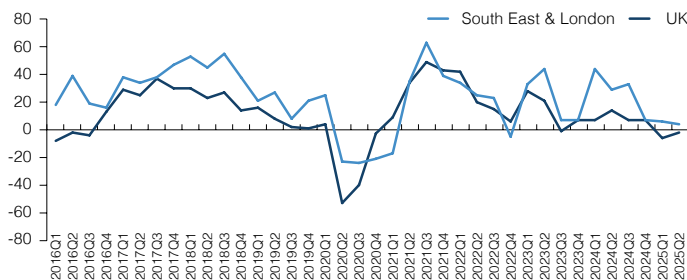
% balance of change in output (past 3 months)



Source: Make UK Manufacturing Outlook Survey

Orders books activity generally outperformed the UK average

% balance of change in orders (past 3 months)



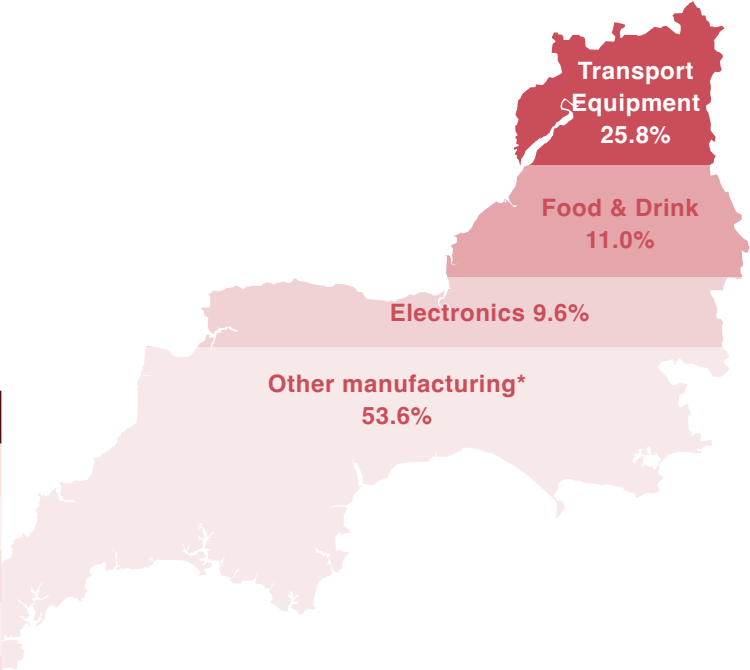
Source: Make UK Manufacturing Outlook Survey

South West

The South West is the UK’s fourth-largest region in terms of gross value add (GVA). The region accounts for 7.5% of the UK’s total output, with the manufacturing industry contributing 0.8% of the UK’s total output. The South West generates 10.7% of its regional output from manufacturing, which is above the UK average of 9.1%. Three major subsectors account for just under half of the South West’s manufacturing output. The largest is the Transport Equipment subsector, with 25.8% of all manufacturing output. This is followed by Food & Drink at 11%, and then the Electronics subsector at 9.6%.

	% UK output	% Regional output
Total GVA	7.5%	–
Manufacturing	0.8%	10.7%
Construction	0.5%	6.7%
Services	5.9%	78.3%
Other production	1.1%	15.0%

Source: ONS 2025



*The sum of subsectors not included in the top 3

Employment

- There are 236,000 manufacturing jobs in the South West, accounting for 7% of the region’s total workforce and 0.6% of the UK’s total workforce.
- This is a “no change” in the last 12 months.

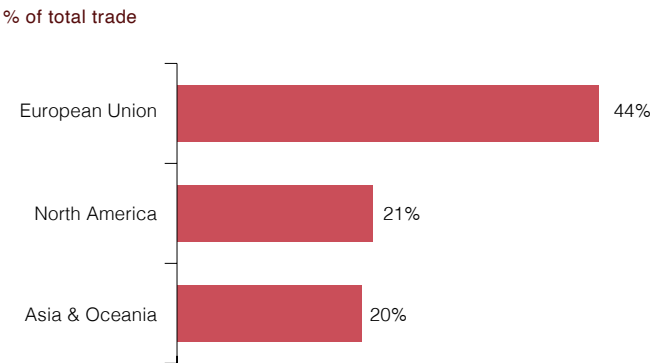
Exports

- The South West accounts for 6% of the UK’s total goods exports.
- The region sees 44% of its exports go to the EU, less than the national average of 50%.
- The next largest destination for the South West’s goods is North America, accounting for 21% of goods exports. Followed closely behind by Asia & Oceania which accounts for 20% of goods exports.

Productivity

- The South West’s overall productivity is the 5th best in the UK, at 88.3% (UK=100)⁶.
- Manufacturing productivity is at 97.4% of the UK average, ranking 7th across all regions and nations.

Top three export markets for South West goods



Source: Uktradeinfo 2025

⁶Due to the ONS no longer publishing statistics for GVA per hour broken down by region/industry since 2020 we have adjusted the methodology to represent productivity as “GVA per job”.

Manufacturing Performance in the South West

The South West has seen a turnaround in its performance following last year's edition of *Regional Outlook*. Last year the region posted some of the weakest balance figures across the board, now in 2025, the region has reported the

strongest balance figures over the year for both output and orders. Despite this turnaround, investment intentions have not followed, with the region being one of only two to have a negative balance this year.

Output balance average best in the UK, major growth in latter quarters

Orders balance figure best in the UK and most improved

Investment intentions negative, one of only two regions to report such

Employment levels modest and in line with average

Average business confidence 9th in the UK

In a major turn of fortune for the South West, the year average performance in this 2025 edition of *Regional Outlook* is vastly improved compared to the 2024 edition. Both output and orders metrics across the year are the most performant out of all regions and nations in the UK, and in the case of orders, the most improved performance in orders observed across the UK compared to last year.

The region's balance figure for output reported at +24% for the year, double the wider UK average output performance. Most of this growth is attributable to the region's quarterly output performance in the latter two quarters of the research window. Similar is observed with orders, with the balance figure for the year reporting at +23%, and is also the most improved orders metric out of all regions and nations compared to last year. A lot of the strong growth for the orders metric is also attributable to the latter two quarters of the research window.

The Transport Equipment subsector, primarily aerospace and defence, accounts for just over a quarter of all manufacturing

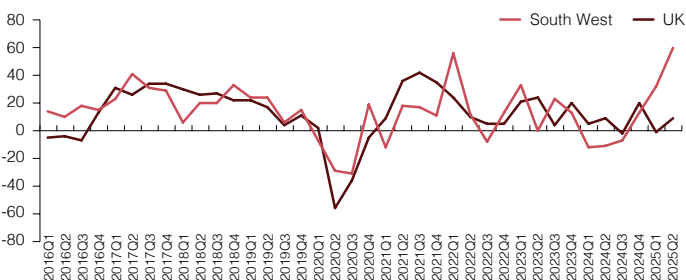
activity in the region. In other words, for each £1 generated by the manufacturing sector in the south west, £0.25p has arisen from the Transport Equipment subsector. Strong growth in this subsector over the past year will have driven the region's improving prospects, and given that it is one of the few regions which is so dominated by a single sector, strong performance in just one subsector can have a leading effect on the region's overall manufacturing performance figures.

Despite the triumphs seen across the core metrics, Investment intentions have not fared anywhere near as well. Conversely, the region's investment intentions for the year ahead are the second lowest out of all regions and nations, reporting a balance figure of -4%. Employment fared better in comparison, reporting at +6% for the year, marginally above the UK average of +4%.

The region's business confidence remains lower in the pack, with a confidence score of 6.4. This is an identical score to last year, and leaves the region the ninth most confident in the UK.

South West production recovers strongly following difficulties in early 2024

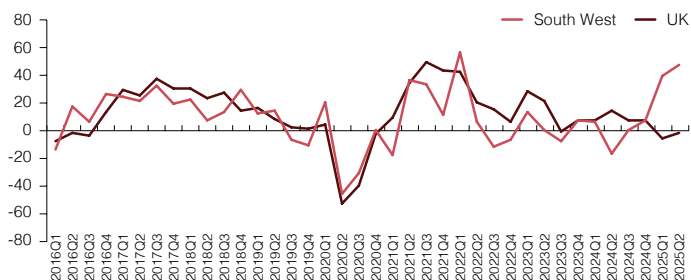
% balance of change in output (past 3 months)



Source: Make UK Manufacturing Outlook Survey

Order books balance vastly exceeded the UK average growth for 2025

% balance of change in orders (past 3 months)



Source: Make UK Manufacturing Outlook Survey

West Midlands

The West Midlands is the UK's sixth largest region in terms of gross value add (GVA), and the third largest manufacturing region. The region accounts for 7.1% of the UK's total output, with the manufacturing industry here contributing to 1% of the UK's total output. The West Midlands generates 13.9% of its regional output from manufacturing, well above the UK average of 9.1%. Three major subsectors account for over half of the West Midlands' manufacturing economy. The Transport Equipment subsector accounts for 28.7% of manufacturing output, primarily represented by the automotive sector. This is followed by Metal Products at 19.9%, and then the Machinery Equipment subsector at 10.8%.

	% UK output	% Regional output
Total GVA	7.1%	–
Manufacturing	1.0%	13.9%
Construction	0.5%	6.7%
Services	5.3%	75.4%
Other production	1.3%	17.8%

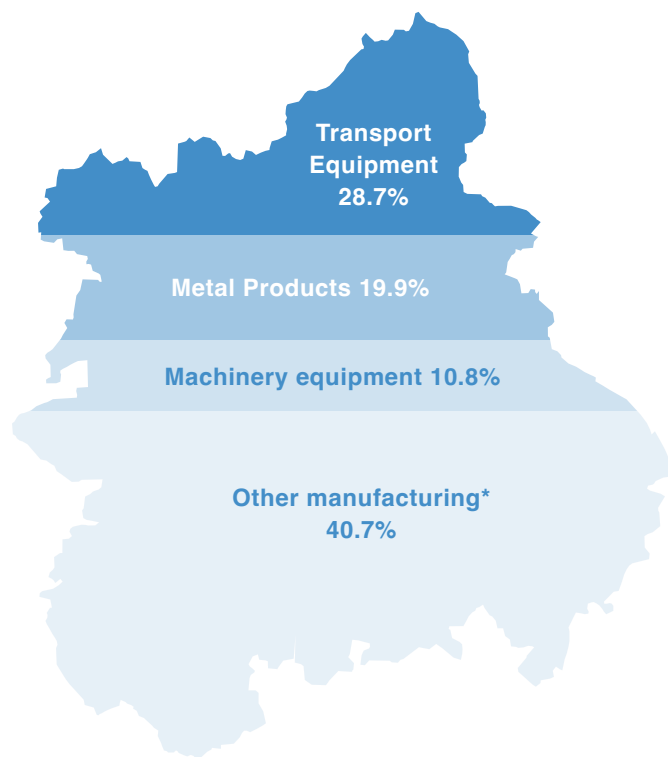
Source: ONS 2025

Employment

- There are 279,000 manufacturing jobs in the West Midlands, accounting for 9% of the region's total workforce and 0.8% of the UK's total workforce.
- This is an increase of 9,000 in the last 12 months.

Exports

- The West Midlands accounts for 8% of the UK's total goods exports.
- The region's dependence on the EU for goods exports stands at 41%, below the UK average of 50%.
- The next largest destination for West Midlands' goods is North America, accounting for 26% of goods exports. Followed by Asia & Oceania which accounts for 19% of goods exports.



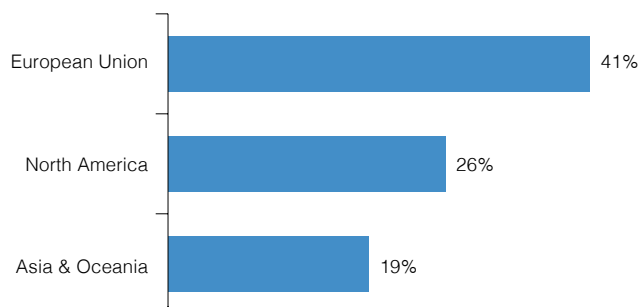
*The sum of subsectors not included in the top 3

Productivity

- The West Midlands' overall productivity ranks 6th in the UK, at 85.7% (UK=100)⁷.
- Manufacturing productivity is at 100%, equal to the UK average, ranking 6th on the table (UK=100).

Top three export markets for West Midlands goods

% of total trade



Source: Uktradeinfo 2025

⁷Due to the ONS no longer publishing statistics for GVA per hour broken down by region/industry since 2020 we have adjusted the methodology to represent productivity as "GVA per job".

Manufacturing Performance in the West Midlands

The West Midlands' performance, based on the average outlook for the key indicators of manufacturing activity, is positive. Whilst there are no superstar performances, the region exceeded its average balance for output compared to last year, reporting at +13%. Though order books performed relatively

worse, dropping from +23% to +7%. Its best performance came from investment intentions, reporting at +15%. Given the region's exposure to automotive and mechanical equipment manufacturers, it is expected that these businesses would continue to invest in capital equipment.

Output balances performed better than the UK average in 2025

Order books growth strong this year following a flat performance in Q3 and Q4 of 2024

Investment intentions accelerated above the UK average in Q2 2024

Employment growth performed better than the UK average across the final three quarters

Average business confidence ranks 7th in the UK

Employment growth in the region was also positive and the joint third best in the UK, posting an average balance of +10%. This growth comes after the implementation of the increase in employers' National Insurance contributions (NICs), which suggests total headcount had not been impacted as negatively as some feared. However, the opportunity cost of higher NICs is unknown, despite official figures indicating the manufacturing employment count had increased by 9,000, it is possible that employment growth could have been even greater in the absence of higher employment costs, including higher minimum wages.

The official statistics also show that the West Midlands region has returned to its pre-covid level of output for its manufacturing sector. In our previous report, this was the only region to have not recovered its total output to levels last seen in 2019, driven by high energy costs, and critical input supply uncertainty (such as semi-conductors) disproportionately affecting the region's biggest industries, automotive and mechanical equipment. Furthermore, last year we reported

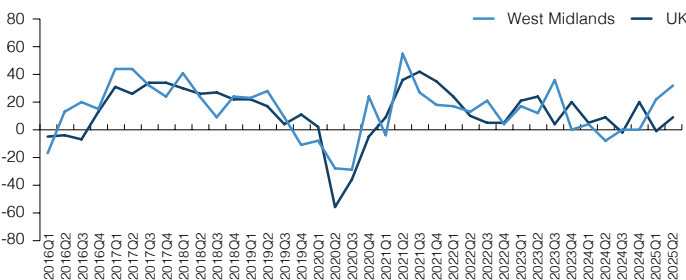
that the automotive sector's share of total manufacturing output in the West Midlands region dropped sharply to around 21%, when typically, it was closer to 1/3 of the region's manufacturing output. This has now returned closer to normal levels at 28.7% of total manufacturing output.

However, there are geopolitical challenges which may reverse the positive trends experienced by the region. Currently, the West Midlands has the highest dependency on trade with the North America region, exporting 26% of its goods there – primarily to the US. Therefore, the impact of tariffs will no doubt impact US demand for UK-produced goods, particularly automotive manufacturers who will be most wary of this. However, the possibility of a UK-US trade agreement may alleviate some of these challenges long-term.

Lastly, average business confidence declined slightly, from 6.7 to 6.6. However, such a minor fall suggests the overall optimism of manufacturers in this region was generally consistent despite any short-term turbulence in economic conditions.

Output balances indicate positive growth in the last two quarters

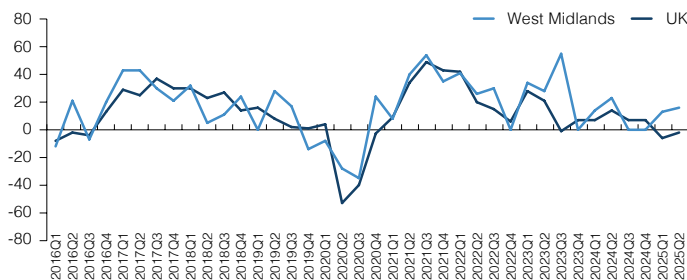
% balance of change in output (past 3 months)



Source: Make UK Manufacturing Outlook Survey

Positive growth in output matched by growth in orders

% balance of change in orders (past 3 months)



Source: Make UK Manufacturing Outlook Survey

Yorkshire & the Humber

Yorkshire & the Humber is the UK's seventh largest region in terms of gross value add (GVA), and the fifth largest manufacturing region. The region accounts for 6.6% of the UK's total output, with the manufacturing industry contributing 0.9% of the UK's total output. Yorkshire & the Humber generates 13.2% of its regional output from manufacturing, significantly above the UK average of 9.1%. Three major subsectors account for just under half of Yorkshire & the Humber's manufacturing output. The largest is the Food & Drink subsector, with 19.1% of manufacturing output. This is followed by the Metal Products subsector, with 15.8% and then the Chemicals subsector at 10.1%.

	% UK output	% Regional output
Total GVA	6.6%	–
Manufacturing	0.9%	13.2%
Construction	0.5%	7.0%
Services	5.0%	75.6%
Other production	1.2%	17.5%

Source: ONS 2025

Employment

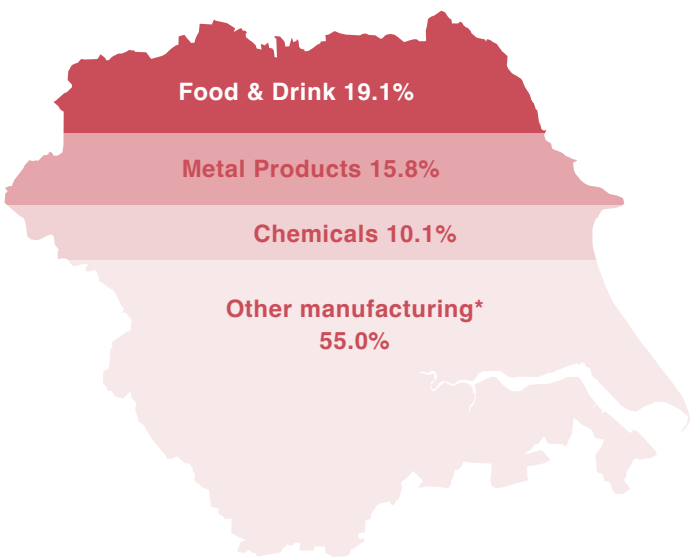
- There are 280,000 manufacturing jobs in Yorkshire & the Humber, accounting for 10% of the region's total workforce and 0.8% of the UK's total workforce.
- This is a decline of 4,000 in the last 12 months.

Exports

- Yorkshire & the Humber accounts for 6% of the UK's total goods exports.
- The region's dependence on the EU reported at 56%, well above the UK average of 50%.
- The next largest destination for Yorkshire & the Humber's goods is North America, accounting for 17% of goods exports. Followed by Asia & Oceania which accounts for 13% of goods exports.

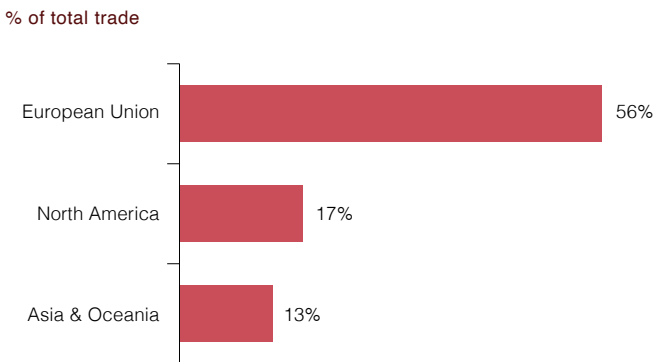
Productivity

- Yorkshire & the Humber's overall productivity ranks 7th in the UK, at 85.4% (UK=100)⁸.
- Manufacturing productivity is at 88.6% of the UK manufacturing average, also ranking 10th across all regions and nations.



*The sum of subsectors not included in the top 3

Top three export markets for Yorkshire & the Humber goods



Source: Uktradeinfo 2025

⁸Due to the ONS no longer publishing statistics for GVA per hour broken down by region/industry since 2020 we have adjusted the methodology to represent productivity as "GVA per job".

Manufacturing Performance in Yorkshire & the Humber

The Yorkshire & the Humber region reported very positive results, improving its average balance in output, orders, investment intentions and employment across the last four quarters. The average balance for output volumes reported

at +19%, up from an average of +15% in the last report. Average order book growth was at +12%, slightly higher than last year's average of +11%.

Output balances performed strongly until the final quarter

Order books growth contracted for a large share of the sector in Q2 2025

Investment intentions were positive for the majority of the period, except for Q2 2025

Employment growth volatile across the last four quarters

Average business confidence 2nd highest in the UK

Employment growth was the biggest concern for this year, as last year the Yorkshire & the Humber region was one of two areas to report an overall average negative balance. However, surprisingly the region has beaten all expectations, despite higher employment costs, and reported the most improved average balance in the UK, reporting at +10%.

This is good news for the region, which has a highly diverse manufacturing sector dominated primarily by Food & Drink. However, official statistics indicate that employment may have declined slightly prior to the activation of higher employer National Insurance contributions and national minimum wages. The difference between the data points may be more reflective of the difference in time periods being considered, as official statistics for employment compare the twelve-month period (March 2024 vs March 2025) whereas our quarterly economic survey's period begins from the start of Q3 2024.

The region's manufacturing output reported growth between 2022 and 2023, increasing by 5.5% to over £21.5bn.⁹ Despite

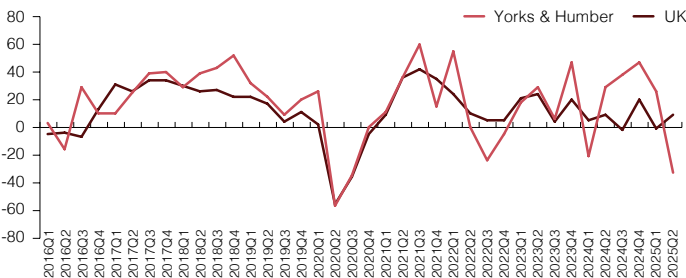
the top three manufacturing subsectors being accounted for by Food & Drink (19.1%), Metal Products (13.9%) and Chemicals (10.1%), more than half (55%) of the region's industrial output comes from a mix of all other sectors. These include subsectors such as Rubber & Plastics (worth £1.8bn) and Paper (£1.6bn).

Yorkshire & the Humber remains one of the most reliant on exports to the European Union (EU) accounting for 56% of goods going there, worth nearly £10bn to the region. This export share is unchanged from last year's reporting, though the value has declined slightly. In comparison, the next two largest destinations (North America and Asia) for exports combined are only worth £5.2bn to the region. Therefore, it is an important step for the region when the UK Government announced plans to reduce frictions with the EU via a "Brexit reset".

Yorkshire & the Humber reported a small improvement in average business confidence, increasing from 6.8 to 7.1. This makes the region the second most confident in the UK, only marginally behind the South East & London.

Y&H output balance performed well for the majority of the last year, except in the most recent quarter

% balance of change in output (past 3 months)

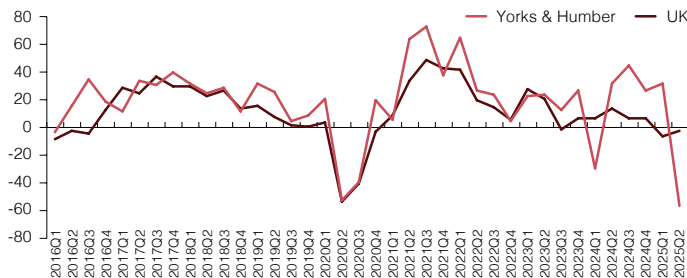


Source: Make UK Manufacturing Outlook Survey

⁹According to the ONS, the latest available data for regional output (GVA) is for 2023

Y&H orders declined for many manufacturers in Q2 2025

% balance of change in orders (past 3 months)



Source: Make UK Manufacturing Outlook Survey

Scotland

Scotland is the UK's fifth largest economy amongst all UK nations and regions in terms of gross value add (GVA) and the eight largest manufacturing economy. The nation accounts for 7.4% of the UK's total output, with the manufacturing industry contributing to 0.7% of the UK's total output. Scotland generates 9.9% of its regional output from manufacturing, slightly above the UK average of 9.1%. Three major subsectors account for just under half of Scotland's manufacturing output. The largest is the Food & Drink industry, with 31.5% of all manufacturing output. This is followed by Pharmaceuticals at 9.1%, and then the Metal Products subsector at 7.9%.

	% UK output	% Regional output
Total GVA	7.4%	–
Manufacturing	0.7%	9.9%
Construction	0.4%	6.0%
Services	5.8%	77.6%
Other production	1.2%	16.4%

Source: ONS 2025

Employment

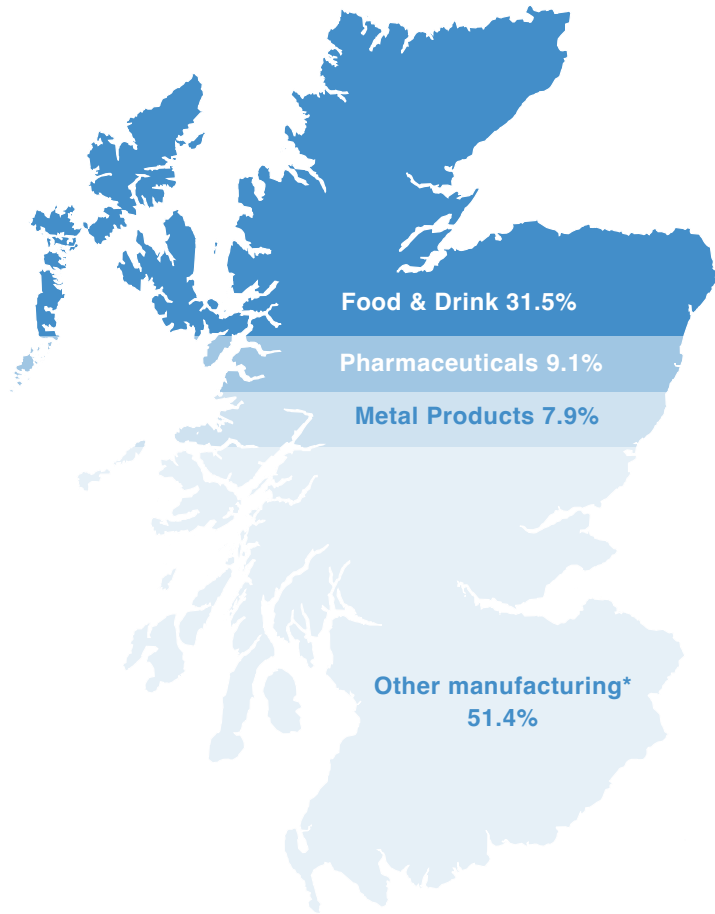
- There are 195,000 manufacturing jobs in Scotland, accounting for 7% of the region's total workforce and 0.5% of the UK's total workforce.
- This is an increase of 4,000 in the last 12 months.

Exports

- Scotland accounts for 10% of the UK's total goods exports.
- The region's dependence on the EU for exports reported at 55% (up from 53%). This makes Scotland the 3rd most dependent on the EU for exports (excluding Northern Ireland).
- The next largest destination for Scotland's goods is Asia & Oceania, accounting for 16% of goods exports. This is followed by North America accounting for 14% of goods exports.

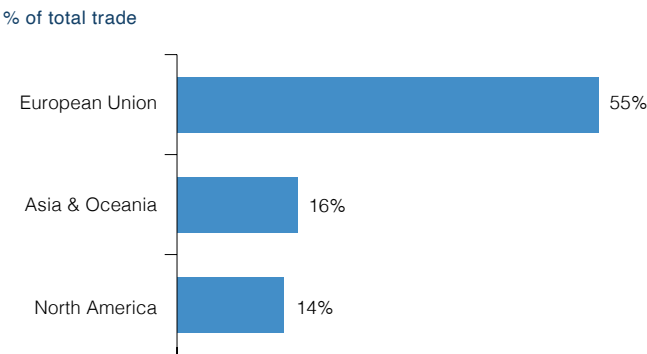
Productivity

- Scotland's overall productivity is the 2nd best in the UK, at 96.5% (UK=100)¹⁰.
- Manufacturing productivity is at 107.5% of the UK manufacturing average, ranking 3rd across all regions and nations (UK=100).



*The sum of subsectors not included in the top 3

Top three export markets for Scottish goods



Source: Uktradeinfo 2025

¹⁰Due to the ONS no longer publishing statistics for GVA per hour broken down by region/industry since 2020 we have adjusted the methodology to represent productivity as "GVA per job".

Manufacturing Performance in Scotland

Scotland's manufacturing sector has performed relatively poorly in comparison to the rest of the UK. Historically, the nation has maintained a strong investment appetite, though in the latest report the average balance is more modest than usual. The standout figures, however, relate to output and

orders, which reported average balances of -4% and -7% respectively. In both cases, these are the weakest results in the UK. Furthermore, the average balance for employment reported at +1% which itself is not strong, though it is not the lowest in the nation.

Lowest average balance for output

Lowest average balance for orders

Investment intentions positive

Employment growth marginally positive

Average business confidence at 6.8¹¹

Scotland's largest manufacturing subsector by value is Food & Drink, worth over £5.7bn to the nation in output. In comparison to the second largest subsector, pharmaceuticals, which only makes up 9.1% of the nation's manufacturing output and produces a smaller £1.7bn. It is not directly clear what resulted in the nation's poor industrial performance, though the over-reliance on one subsector and dependence on the European market may be partly the cause. The nation is home to several well-known beverage brands like BrewDog, Heineken and Irn Bru and so opportunities for growth will undoubtedly return.

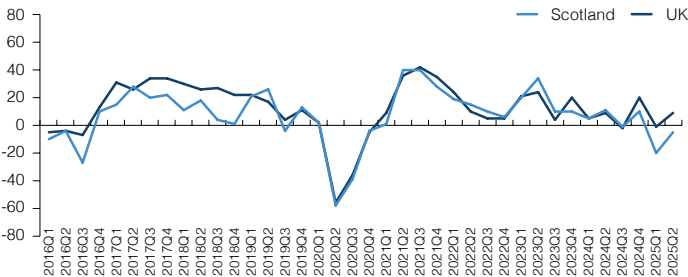
Comparing Scotland to other UK regions and Wales, the nation is the third most dependent on the European Union for its exports, worth nearly £18bn to the economy.

The next two most important export destinations combined (Asia & Oceania and North America) are only worth £9.5bn, highlighting the importance of the EU collective for Scotland's manufacturing industry. Manufacturers here will likely be pleased to hear about the UK Government's intentions to ease trading frictions with the EU through measures such as reducing border checks for food and drink, given the importance of this subsector to Scotland.

Finally, average business confidence in Scotland ranks in the middle of all regions and nations in the UK. Historically, confidence in Scotland has been marginally lower regardless of the actual performance of businesses, so this average improvement reflects a positive change for the nation.

Scotland's output performance slightly worse than the UK average in the last three quarters

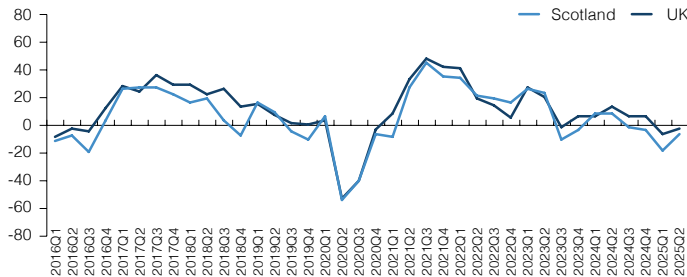
% balance of change in output (past 3 months)



Source: Make UK Manufacturing Outlook Survey

Scotland's orders performance worse than the UK's for the last five quarters

% balance of change in orders (past 3 months)



Source: Make UK Manufacturing Outlook Survey

¹¹Scotland's confidence measure is developed using a different methodology. Therefore, the confidence figure is not directly comparable to the rest of the UK.

Wales

Wales is the ninth largest economy in the UK, across all regions and nations, and also the ninth largest for manufacturing economy too. The nation accounts for 3.3% of the UK's total output, with the manufacturing industry here contributing to 0.5% of the UK's total output. Wales generates 15.6% of its national output from manufacturing, which is well above the UK average of 9.1%. Three major subsectors account for just under half of Wales' manufacturing output. The largest is the Transport Equipment industry, with 17.8% of all manufacturing output. This is followed by the Food & Drink subsector at 15.2% and then the Metal Products subsector at 11.3%.

	% UK output	% Regional output
Total GVA	3.3%	–
Manufacturing	0.5%	15.6%
Construction	0.2%	6.4%
Services	2.4%	72.7%
Other production	0.7%	21.0%

Source: ONS 2025

Employment

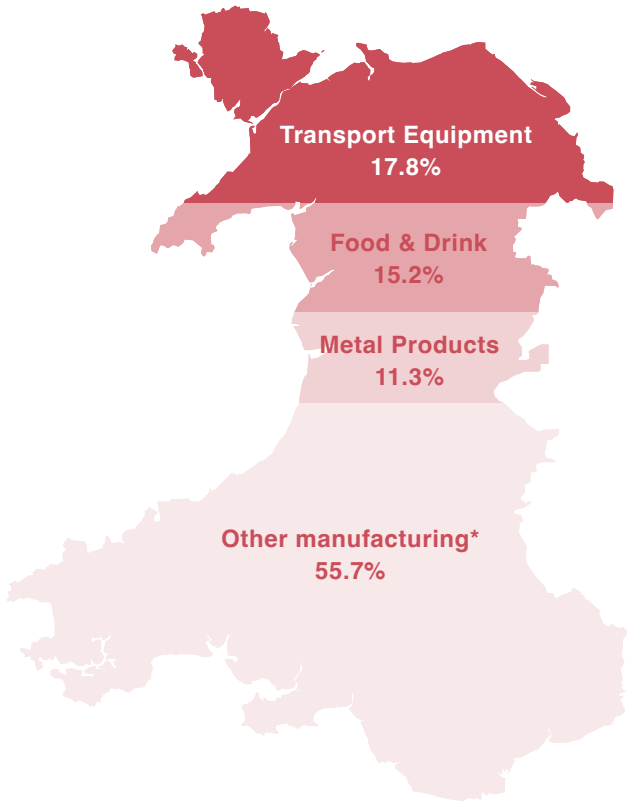
- There are 138,000 manufacturing jobs in Wales, accounting for 9% of the nation's total workforce and 0.4% of the UK's total workforce.
- This latest figure is a decrease of 12,000 jobs in the last 12 months.

Exports

- Wales accounts for 6% of the UK's total goods exports.
- The nation sees 61% of its exports go to the EU, well above the UK average of 50%. This makes Wales the most dependent on the EU for exports (when excluding Northern Ireland).
- The next largest destination for Wales' goods is North America, accounting for 15% of goods exports. Followed by Asia & Oceania which accounts for 13% of goods exports.

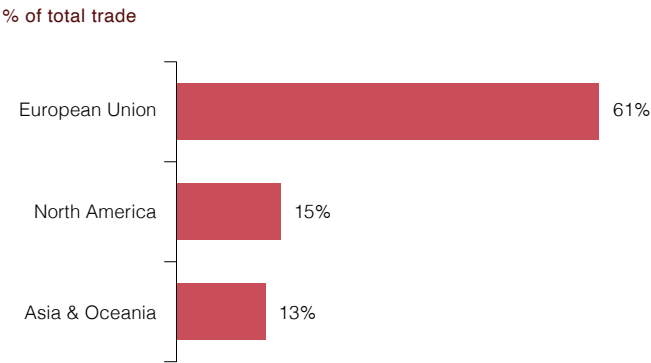
Productivity

- Wales' overall productivity ranks 9th in the UK, at 83.7% (UK=100)¹².
- Manufacturing productivity is at 105.9% of the UK average, ranking 4th across all regions and nations.



*The sum of subsectors not included in the top 3

Top three export markets for Welsh goods



Source: Uktradeinfo 2025

¹²Due to the ONS no longer publishing statistics for GVA per hour broken down by region/industry since 2020 we have adjusted the methodology to represent productivity as "GVA per job".

Manufacturing Performance in Wales

Manufacturers in Wales performed well in our key metrics this year, though relative to last year, most average balances are down. The metric for employment stands out, reporting an average balance of +14% - the highest in the UK. Though this balance is not itself remarkable, it highlights the nation's

progress despite rising employment costs for the sector. Average output and order books growth also reported positive balances, at +21% and +17% respectively. The average balance for investment intentions reported the largest slowdown in the nation, falling from +26% to +7%.

Average output balance 3rd best in the UK

Average order books balance 3rd best in the UK

Average investment intentions balance reported biggest slowdown in the UK

Average employment balance best in the UK

Average business confidence ranks 10th in the UK

The manufacturing sector in Wales is critical to the nation's economic output, accounting for 15.6% of total output and worth over £12bn. The nation is host to a wide range of manufacturing subsectors, though the aerospace industry stands out – housing key players like Airbus, BAE Systems and British Airways. In addition, manufacturers like the Royal Mint or the pharmaceutical company Ipsen Biopharm add to the diversity of manufacturers in the nation.

The last twelve months have been positive for manufacturers in Wales, though external challenges lie ahead. Bar Northern Ireland, Wales is the most dependent on the European Union (EU) for its exports, with 61% of its exports (valued at £10bn) travelling there. This means that the UK's objective to improve trading conditions with our closest neighbour via a "Brexit reset" should be positive for Welsh manufacturers. However, tariffs from the US may still impact these businesses as Wales exports £2.5bn worth of goods to the North America region. On a positive note, Wales is home to a large number of businesses that will likely fall under the

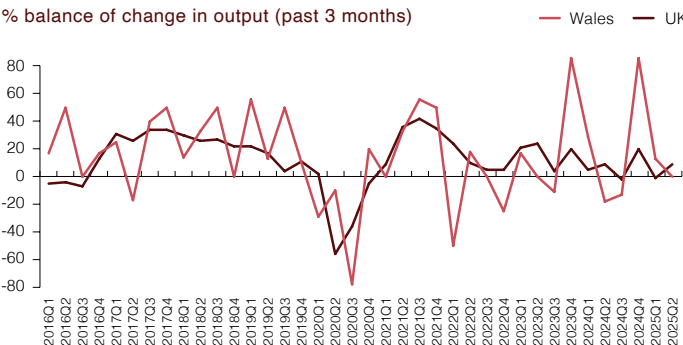
Government's definition of Advanced Manufacturing which, we hope, will provide greater support and certainty for investment in the country.

Furthermore, whilst the survey data indicates that employment in the nation has likely expanded between the third quarter of 2024 and the second quarter of 2025, the official statistics highlight that when comparing headcount between March 2024 and March 2025, employment has in fact declined. This discrepancy is likely down to a difference in compared timing and suggests employment levels may be more volatile in Wales.

Finally, average business confidence declined from 6.5 to 6.2 which is surprisingly the lowest in the UK. Despite ranking bottom of the nation, the high confidence is a testament to the resilience of the wider manufacturing sector in the UK as businesses across the board have been optimistic regardless of volatility in external economic conditions.

Output balances became more volatile in the last 12 months

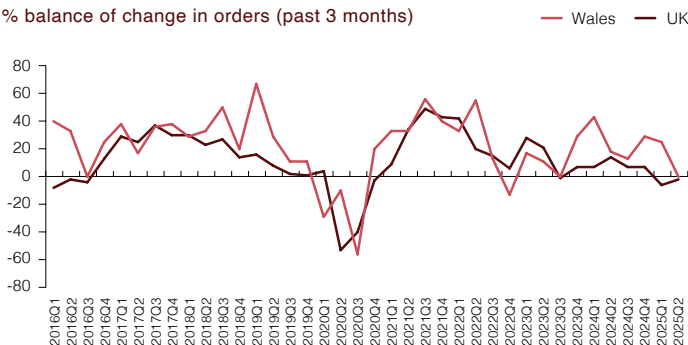
% balance of change in output (past 3 months)



Source: Make UK Manufacturing Outlook Survey

Welsh manufacturing order books growth positive since the start of 2023

% balance of change in orders (past 3 months)



Source: Make UK Manufacturing Outlook Survey

Regional Manufacturing Outlook 2025



Make UK is backing manufacturing – helping our sector to engineer a digital, global and green future. From the First Industrial Revolution to the emergence of the Fourth, the manufacturing sector has been the UK's economic engine and the world's workshop. The 20,000 manufacturers we represent have created the new technologies of today and are designing the innovations of tomorrow. By investing in their people, they continue to compete on a global stage, providing the solutions to the world's biggest challenges. Together, manufacturing is changing, adapting and transforming to meet the future needs of the UK economy. A forward-thinking, bold and versatile sector, manufacturers are engineering their own future.

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Accountancy and business advisory firm BDO LLP is the UK member firm of BDO International, which has more than 1,800 offices in 166 countries. We operate from 18 offices across the UK, employing 7,400 people offering tax, audit and assurance, and a range of advisory services.

Manufacturing is a priority sector for BDO and this focus enables us to tailor the wide range of services we offer and apply our skills and knowledge to help clients achieve their objectives.

We provide real solutions to industry issues, utilising our capabilities in everything from sector-specific accountancy, tax and business advice to patent box and research and development claims and M&A opportunities to help our clients grow in the UK and overseas. We also provide manufacturing businesses and organisations with robust, independent audits.

We have an excellent understanding of the issues affecting UK manufacturers as an industry sector, but we also focus on specific sub-sectors to improve our knowledge and our service to clients. These include: advanced manufacturing, aerospace and defence, automotive, building products, chemicals and pharmaceuticals, food and drink, electronics, industrials, test and measurement and technology.

Manufacturing remains one of the key industries of the UK economy. We are delighted to be able to play an active role in supporting the businesses that operate in this vibrant, changing and challenging sector. For further information about our business and services, please visit our website: **www.bdo.co.uk**

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