Findings from a survey of businesses in the manufacturing industry

June 2019
Background
Approach

The aim of this research was to assess the needs, experiences and issues affecting businesses in the manufacturing industry in Northern Ireland. Perceptive Insight, an independent market research company, collected information on businesses’ performance, activity and experiences within the manufacturing industry.

A total of 139 questionnaires were completed by manufacturing businesses in Northern Ireland.

Online survey emailed to manufacturing businesses in Northern Ireland

Data was processed and analysed using specialist survey software

*Fieldwork ran from 24th May – 15th June.*
Business profile

SIZE OF BUSINESS

- 17% Up to 9
- 17% 50-99
- 28% 10-49
- 38% 100+

TOP 3 MANUFACTURING SECTORS

- 19% Machinery & equipment
- 15% Other manufacturing and repair
- 13% Wood, paper & printing
Executive summary
What did we learn: key insights

GROWTH & STABILITY

Performance & Trade
Although not as positive as the December '18 survey, the findings suggest a fairly good experience for most manufacturing businesses:
- 67% of those surveyed described their business as being in a position of growth.
- 87% said their business had been profitable in the last 12 months.
- 47% have increased their number of staff in the last 12 months.

Outlook for the future
- 47% of businesses expect that their business will grow in the next 12 months.
- 39% expect that their business will remain the same, with 10% anticipating a decrease and 4% uncertain.

ISSUES & CONCERNS

Top 4 most prevalent concerns
1. Impact or uncertainty of Brexit – 76% businesses rated this 4 or 5.
   - 28% are unsure as to what the impact Brexit will have on their business.
   - 60% of businesses expect Brexit to have a negative impact on their business.
   - 45% have actively stockpiled to ensure continuity of supply.
2. Political uncertainty/climate – 69% businesses rated this 4 or 5.
3. The rising costs of doing business – 61% businesses rated this 4 or 5.
   - 69% of businesses are looking to be more resourceful with current facilities and working capital.
   - 35% are building cash reserves in case of future uncertainty.
4. Recruiting skills required to meet orders – 56% businesses rated this 4 or 5.
   - 78% found it difficult to recruit the skills needed.
   - Under half (45%) are introducing training and development programmes to attract new and/or upskill existing staff.
   - 37% are speeding up plans to increase automation.
   - 36% are reviewing remuneration packages.
Performance & Trade
Q3 Over the past 12 months, have your sales increased, decreased or remained the same?

<table>
<thead>
<tr>
<th>Category</th>
<th>December 2018</th>
<th>May 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increased</td>
<td>58%</td>
<td>74%</td>
</tr>
<tr>
<td>Remained the same</td>
<td>19%</td>
<td>33%</td>
</tr>
<tr>
<td>Decreased</td>
<td>7%</td>
<td>10%</td>
</tr>
</tbody>
</table>

Base 139: All respondents
Q4 Over the past 12 months, has your number of employees increased, decreased or remained the same?

<table>
<thead>
<tr>
<th>Category</th>
<th>December 2018</th>
<th>May 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increased</td>
<td>57%</td>
<td>45%</td>
</tr>
<tr>
<td>Remained the same</td>
<td>35%</td>
<td>46%</td>
</tr>
<tr>
<td>Decreased</td>
<td>8%</td>
<td>9%</td>
</tr>
</tbody>
</table>

Base 139: All respondents
Q5 Which of the following best describes the current position of your business?

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
<th>December 2018</th>
<th>May 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rapid growth/expansion (&gt;20%)</td>
<td>8</td>
<td>15%</td>
<td>10%</td>
</tr>
<tr>
<td>Moderate growth/expansion (5% to 20%)</td>
<td>40</td>
<td>45%</td>
<td>39%</td>
</tr>
<tr>
<td>Slight growth/expansion (&lt;5%)</td>
<td>19</td>
<td>20%</td>
<td>23%</td>
</tr>
<tr>
<td>Stable</td>
<td>21</td>
<td>16%</td>
<td>21%</td>
</tr>
<tr>
<td>Reducing/contraction</td>
<td>11</td>
<td>4%</td>
<td>6%</td>
</tr>
<tr>
<td>Winding down</td>
<td>1</td>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>

1 Due to rounding percentages add to >100%
Q6 During the past 12 months, has your business been profitable?

- Yes: 87% (December 2018: 89%, May 2018: 81%)
- No: 10% (December 2018: 10%, May 2018: 17%)
- Not sure: 3% (December 2018: 2%, May 2018: 1%)

Due to rounding percentages add to <100%.
Q6b Typically, what are the margins that your businesses work to?

<table>
<thead>
<tr>
<th>Margin</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 5%</td>
<td>19</td>
<td>16%</td>
</tr>
<tr>
<td>5% to 10%</td>
<td>36</td>
<td>41%</td>
</tr>
<tr>
<td>11% to 20%</td>
<td>29</td>
<td>29%</td>
</tr>
<tr>
<td>More than 20%</td>
<td>14</td>
<td>13%</td>
</tr>
<tr>
<td>Not sure</td>
<td>2</td>
<td>2%</td>
</tr>
</tbody>
</table>

1 Due to rounding percentages add to <100%
Q7 In the last 12 months, approximately, what percentage of your sales are...?

<table>
<thead>
<tr>
<th></th>
<th>0%</th>
<th>1% to 10%</th>
<th>11% to 30%</th>
<th>31% to 50%</th>
<th>71% to 90%</th>
<th>91% to 99%</th>
<th>100%</th>
<th>Not sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic - within NI</td>
<td>10</td>
<td>32</td>
<td>14</td>
<td>9</td>
<td>11</td>
<td>12</td>
<td>6</td>
<td>6</td>
</tr>
<tr>
<td>Exports - GB</td>
<td>16</td>
<td>33</td>
<td>13</td>
<td>13</td>
<td>16</td>
<td>9</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Exports - ROI</td>
<td>18</td>
<td>45</td>
<td>24</td>
<td>9</td>
<td>31</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Exports - EU</td>
<td>45</td>
<td>32</td>
<td>14</td>
<td>6</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Exports - Rest of World</td>
<td>49</td>
<td>28</td>
<td>9</td>
<td>9</td>
<td>31</td>
<td></td>
<td></td>
<td>1%</td>
</tr>
</tbody>
</table>

1 Due to rounding percentages add to 99%-102%
Q8 Compared to the past 12 months, do you expect your level of growth to increase, decrease or remain the same?

<table>
<thead>
<tr>
<th></th>
<th>December 2018</th>
<th>May 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase over next 12 months</td>
<td>57%</td>
<td>55%</td>
</tr>
<tr>
<td>Remain the same</td>
<td>28%</td>
<td>35%</td>
</tr>
<tr>
<td>Decrease over next 12 months</td>
<td>7%</td>
<td>5%</td>
</tr>
<tr>
<td>Not sure</td>
<td>8%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Due to rounding percentages add to <100%
Q9 Approximately, what percentage of your supplies, by value, come from...?

- **Domestic - within NI**
  - 0%
  - 1% to 10%
  - 11% to 30%
  - 31% to 50%
  - 51% to 70%
  - 71% to 90%
  - 91% to 99%
  - 100%
  - Not sure: 1%

- **Imports - GB**
  - 0%
  - 1% to 10%
  - 11% to 30%
  - 31% to 50%
  - 51% to 70%
  - 71% to 90%
  - 91% to 99%
  - 100%
  - Not sure: 1%

- **Imports - ROI**
  - 0%
  - 1% to 10%
  - 11% to 30%
  - 31% to 50%
  - 51% to 70%
  - 71% to 90%
  - 91% to 99%
  - 100%
  - Not sure: 1%

- **Imports - Rest of EU**
  - 0%
  - 1% to 10%
  - 11% to 30%
  - 31% to 50%
  - 51% to 70%
  - 71% to 90%
  - 91% to 99%
  - 100%
  - Not sure: 1%

- **Imports - Rest of World**
  - 0%
  - 1% to 10%
  - 11% to 30%
  - 31% to 50%
  - 51% to 70%
  - 71% to 90%
  - 91% to 99%
  - 100%
  - Not sure: 1%

1 Due to rounding percentages add to >100%
Business strategy and productivity
Q10 To what extent, if at all, are each of the following an issue for your business currently?

- **Impact or uncertainty of Brexit**: 54% (huge issue), 22% (very big issue), 12% (big issue), 9% (some issue), 4% (not at all)
  - December 2018: 1st
  - May 2018: 2nd

- **Political uncertainty/climate**: 42% (huge issue), 27% (very big issue), 12% (big issue), 9% (some issue), 9% (not at all)
  - December 2018: 3rd
  - May 2018: 3rd

- **Cost of doing business**: 29% (huge issue), 32% (very big issue), 26% (big issue), 10% (some issue), 3% (not at all)
  - December 2018: 2nd
  - May 2018: 1st

- **Problems recruiting skills to meet orders**: 30% (huge issue), 26% (very big issue), 17% (big issue), 12% (some issue), 15% (not at all)
  - December 2018: 4th
  - May 2018: 4th

- **Bureaucracy / red tape**: 26% (huge issue), 22% (very big issue), 22% (big issue), 22% (some issue), 9% (not at all)

- **Government policy areas**: 14% (huge issue), 17% (very big issue), 32% (big issue), 26% (some issue), 12% (not at all)

- **Problems with employees leaving your business**: 11% (huge issue), 19% (very big issue), 22% (big issue), 22% (some issue), 27% (not at all)

- **Cash flow**: 17% (huge issue), 11% (very big issue), 22% (big issue), 23% (some issue), 27% (not at all)

- **Reduction in demand for goods and services**: 11% (huge issue), 14% (very big issue), 22% (big issue), 28% (some issue), 24% (not at all)

- **New competitors in your market**: 9% (huge issue), 17% (very big issue), 27% (big issue), 31% (some issue), 16% (not at all)

- **Changes to employment law**: 9% (huge issue), 16% (very big issue), 32% (big issue), 27% (some issue), 16% (not at all)

- **Availability of funding**: 12% (huge issue), 12% (very big issue), 22% (big issue), 27% (some issue), 28% (not at all)

- **Keeping up with innovation and developments in your industry**: 6% (huge issue), 17% (very big issue), 34% (big issue), 20% (some issue), 22% (not at all)

- **The ongoing trade war between the US and China and potential tariff changes**: 4% (huge issue), 12% (very big issue), 20% (big issue), 32% (some issue), 32% (not at all)

1 Due to rounding percentages add to 99%-101%
Q11 In the past 12 months, have the following input costs to your business increased, decreased or remained the same?

- **Energy**
  - Decreased: 3%
  - Remained the same: 22%
  - Increased: 75%

- **Labour**
  - Decreased: 3%
  - Remained the same: 4%
  - Increased: 94%

- **Transportation**
  - Decreased: 2%
  - Remained the same: 17%
  - Increased: 81%

- **Taxation**
  - Decreased: 1%
  - Remained the same: 64%
  - Increased: 35%

Due to rounding percentages add to 99%-101%
Q11 What has been the approximate percentage rise in energy, labour, transportation and taxation input costs?

<table>
<thead>
<tr>
<th>Input Costs</th>
<th>&lt;1%</th>
<th>&gt;1%, &lt;2%</th>
<th>&gt;2%, &lt;3%</th>
<th>&gt;3%, &lt;4%</th>
<th>&gt;4%, &lt;5%</th>
<th>&gt;5%, &lt;10%</th>
<th>More than 10%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Energy input costs</td>
<td>5</td>
<td>10</td>
<td>13</td>
<td>23</td>
<td>24</td>
<td>19</td>
<td>7%</td>
</tr>
<tr>
<td>Labour input costs</td>
<td>12</td>
<td>15</td>
<td>24</td>
<td>20</td>
<td>25</td>
<td>13</td>
<td>-</td>
</tr>
<tr>
<td>Transportation input costs</td>
<td>4</td>
<td>11</td>
<td>17</td>
<td>22</td>
<td>29</td>
<td>11</td>
<td>5%</td>
</tr>
<tr>
<td>Taxation input costs</td>
<td>2</td>
<td>15</td>
<td>10</td>
<td>8</td>
<td>17</td>
<td>19</td>
<td>8</td>
</tr>
</tbody>
</table>

Due to rounding percentages add to 99%-101%

Individual bases below.
Investment and finance
Q12 Over the next 12 months, do you have plans in place to undertake any of the following types of investment for your business?

<table>
<thead>
<tr>
<th>Investment Type</th>
<th>December 2018</th>
<th>May 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>R&amp;D or product development</td>
<td>61%</td>
<td>54%</td>
</tr>
<tr>
<td>Increase sales and marketing</td>
<td>63%</td>
<td>72%</td>
</tr>
<tr>
<td>Upgrade or introduce new facilities/machinery</td>
<td>59%</td>
<td>71%</td>
</tr>
<tr>
<td>Increase the number of employees</td>
<td>52%</td>
<td>62%</td>
</tr>
<tr>
<td>Increase level of staff training</td>
<td>51%</td>
<td>52%</td>
</tr>
<tr>
<td>Expand export markets</td>
<td>46%</td>
<td>44%</td>
</tr>
<tr>
<td>Robotics/automation</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Upgrade or change to new premises</td>
<td>32%</td>
<td>31%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>None of the above</td>
<td>7%</td>
<td>5%</td>
</tr>
</tbody>
</table>

1 Multi response question so percentage is greater than 100%
**Q13 In the last 12 months have you applied for R&D tax credits?**

*Base: 139. All respondents*

- **Not aware of R&D tax credits**: 4%
- **No**: 31%
- **Yes**: 65%

**Q13b Why have you not applied for R&D Tax Credits?**

*Base: 41. Those who have not applied for tax credits*

- **Not applicable to your area of business**: 39 (33%)
- **Too bureaucratic**: 29 (30%)
- **Don't know enough about them**: 27 (33%)
- **Lack of resources**: 27 (9%)
- **Other**: 2 (7%)
- **Not sure**: 7 (2%)

¹ Multi response question so percentage is greater than 100%
Q14 Is your business currently undertaking any of the following activities?

Base 139: All respondents

- **None of the above**: 14%
- **Hedging against currency risks in future**: 24%
- **Active looking to borrow for investment**: 23%
- **Building up stock in case of supply issues in the future**: 24%
- **Building up cash reserves in case of uncertainty in the future**: 35%
- **Trying to be more resourceful with current facilities and working capital**: 69%

December 2018

- **None of the above**: 3%
- **Hedging against currency risks in future**: 21%
- **Active looking to borrow for investment**: 17%
- **Building up stock in case of supply issues in the future**: 38%
- **Building up cash reserves in case of uncertainty in the future**: 41%
- **Trying to be more resourceful with current facilities and working capital**: 65%

1 Multi response question so percentage is greater than 100%
Impact of leaving the EU
Q15 What impact, if any, will Brexit have on your business?

- Large positive impact: 5 responses (4% in December 2018, 3% in May 2018)
- Small positive impact: 3 responses (2% in December 2018, 8% in May 2018)
- No impact: 4 responses (8% in December 2018, 7% in May 2018)
- Small negative impact: 16 responses (16% in December 2018, 21% in May 2018)
- Large negative impact: 44 responses (34% in December 2018, 20% in May 2018)
- Not sure: 28 responses (37% in December 2018, 41% in May 2018)
Q16 In case of a possible period of disruption to supply chains during March/April 2019, did your business actively stockpile to ensure continuity of supply?

Base 139: All respondents

- Yes: 45%
- No: 54%
- Not sure: 1%
Q16 Would you say that you have a stock of parts or raw materials or finished goods that you would expect to last...?

Parts or raw materials:
- Less than 1 month: 11%
- 1-3 months: 46%
- 3-6 months: 38%
- More than 6 months: 3%
- Not sure: 2%

Finished goods:
- Less than 1 month: 33%
- 1-3 months: 44%
- 3-6 months: 16%
- More than 6 months: 2%
- Not sure: 5%

1 Due to rounding percentages add to 99%-101%
Q17 How are you responding to the repeated delay in the UK's exit from the EU?

- Carrying on with business as usual, no special provisions or change of plan: 61%
- Pausing at the moment but planning to resume or begin stockpiling in anticipation of another "cliff-edge" at the end of October: 17%
- Running down inventories accumulated in anticipation of Brexit taking place at the end of March: 6%
- Continuing to stockpile but at a reduced pace: 6%
- Most of our sales are to GB or outside the EU and therefore little direct impact: 5%
- Other (please specify):
  - Rationalising products to reduce labour requirement
  - Trying to find new export markets
  - Further expansion of premises in ROI
- None of the above: 2%

Other responses included:
Skills & People
Q18 Approximately what percentage of your staff is...?

- From NI
  - 0%: 22
  - 1% to 10%: 6
  - 11% to 30%: 10
  - 31% to 50%: 17
  - 51% to 70%: 25
  - 71% to 90%: 19
  - 91% to 99%: 19
  - 100%: 1

- From GB
  - 0%: 55
  - 1% to 10%: 35
  - 11% to 30%: 7
  - 31% to 50%: 11
  - 51% to 70%: 7
  - 71% to 90%: 11
  - 91% to 99%: 2

- From ROI
  - 0%: 60
  - 1% to 10%: 29
  - 11% to 30%: 8
  - 31% to 50%: 11
  - 51% to 70%: 11
  - 71% to 90%: 2

- From EU (excl ROI)
  - 0%: 32
  - 1% to 10%: 34
  - 11% to 30%: 17
  - 31% to 50%: 9
  - 51% to 70%: 6
  - 71% to 90%: 2

- From rest of world
  - 0%: 84
  - 1% to 10%: 15
  - 11% to 30%: 1

Not sure: 1%

**Base 139: All respondents**

Due to rounding percentages add to >100%
Q19 If you employ migrant workers, has that number in the last 12 months...?

- **Increased**: 12 (11% in December 2018, 8% in May 2018)
- **Decreased**: 33 (37% in December 2018, 12% in May 2018)
- **Remained the same**: 22 (18% in December 2018, 32% in May 2018)
- **Do not employ migrant workers**: 30 (34% in December 2018, 47% in May 2018)
- **Not sure**: 3 (1% in December 2018, 1% in May 2018)

*Base 139: All respondents*
Q20 On average what wage increases were delivered over the last 12 months?

<table>
<thead>
<tr>
<th>Wage Increase</th>
<th>December 2018</th>
<th>May 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>0%</td>
<td>4</td>
<td>7%</td>
</tr>
<tr>
<td>0-1%</td>
<td>7</td>
<td>2%</td>
</tr>
<tr>
<td>1-2%</td>
<td>27</td>
<td>15%</td>
</tr>
<tr>
<td>2-3%</td>
<td>30</td>
<td>33%</td>
</tr>
<tr>
<td>3-5%</td>
<td>27</td>
<td>25%</td>
</tr>
<tr>
<td>&gt;5%</td>
<td>27</td>
<td>19%</td>
</tr>
<tr>
<td>Average wage has decreased</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Not sure</td>
<td>3</td>
<td>18%</td>
</tr>
</tbody>
</table>
Q21 In the last 12 months, have you tried to recruit new staff?  
*Base: 139, All respondents*

<table>
<thead>
<tr>
<th></th>
<th>December 2018</th>
<th>May 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>89%</td>
<td>83%</td>
</tr>
<tr>
<td>No</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Q21b How easy or difficult was it to recruit the skills you needed?  
*Base: 113, Those who tried to recruit new staff*

<table>
<thead>
<tr>
<th>Difficulty Level</th>
<th>December 2018</th>
<th>May 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very easy</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Quite easy</td>
<td></td>
<td>6%</td>
</tr>
<tr>
<td>Neither easy nor difficult</td>
<td></td>
<td>12%</td>
</tr>
<tr>
<td>Quite difficult</td>
<td>40%</td>
<td>41%</td>
</tr>
<tr>
<td>Very difficult</td>
<td>41%</td>
<td>33%</td>
</tr>
</tbody>
</table>
Q22 In the area of upskilling and training, have you undertaken any of the following training programmes?

Base 139: All respondents

- Apprenticeships: 50%
- Leadership and management training: 40%
- Work experience programme: 32%
- Assured skills training programme: 6%
- Steps 2 Success: 4%
- Training for Success: 4%
- Bridge to Employment: 3%
- Prince’s Trust: 1%
- Other: 4%
- None of the above: 31%

Other responses included:
- On the job / internal training
- Career ready
- Fire warden and forklift training

1 Multi response question so percentage is greater than 100%
Q23 In order to address the challenge of skills and labour shortages, are you currently doing any of the following?

<table>
<thead>
<tr>
<th>Activity</th>
<th>December 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introducing training and development programmes to attract new and/or upskill existing staff</td>
<td>40%</td>
</tr>
<tr>
<td>Speeding up plans to increase automation</td>
<td>52%</td>
</tr>
<tr>
<td>Reviewing remuneration and benefit packages for employees</td>
<td>41%</td>
</tr>
<tr>
<td>Looking at recruiting people with more diverse backgrounds/skills</td>
<td>23%</td>
</tr>
<tr>
<td>Looking at recruiting people from outside your usual local geographic market</td>
<td>22%</td>
</tr>
<tr>
<td>Turning down potential new business opportunities/orders</td>
<td>21%</td>
</tr>
<tr>
<td>Other</td>
<td>-</td>
</tr>
<tr>
<td>None of the above</td>
<td>14%</td>
</tr>
<tr>
<td>Not sure</td>
<td>2%</td>
</tr>
</tbody>
</table>

Other responses included:
- Introducing lean principles
- Change manufacturing

\(^1\) Due to rounding percentages add to <100%
Q24 In the last 12 months, in order to retain or recruit staff have you undertaken any of the following steps?

- **Increased levels of basic pay**: 71 (72%)
- **Improved non-financial benefits such as holiday entitlement, hours of work, health insurance etc**: 32 (25%)
- **Increased levels of bonuses**: 27 (29%)
- **Introduced more flexible shift patterns**: 27 (25%)
- **None of the above**: 14 (20%)
- **Not sure**: 1 (1%)

1 Due to rounding percentages add to <100%
Thank you for reading.

If you have any questions please get in touch with the team

Maureen Treacy
Managing Director
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Appendices:
Appendix A: Q1 Which of the following manufacturing sectors best describes the main activity of your business?

<table>
<thead>
<tr>
<th>Sector</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Machinery and equipment</td>
<td>19</td>
</tr>
<tr>
<td>Other manufacturing and repair</td>
<td>15</td>
</tr>
<tr>
<td>Wood, paper products and printing</td>
<td>13</td>
</tr>
<tr>
<td>Rubber, plastic and other non-metallic mineral products</td>
<td>12</td>
</tr>
<tr>
<td>Food products, beverages and tobacco</td>
<td>9</td>
</tr>
<tr>
<td>Basic metals and metal products</td>
<td>8</td>
</tr>
<tr>
<td>Textiles, wearing apparel and leather products</td>
<td>6</td>
</tr>
<tr>
<td>Electrical equipment</td>
<td>6</td>
</tr>
<tr>
<td>Transport equipment</td>
<td>4</td>
</tr>
<tr>
<td>Chemicals and chemical products</td>
<td>4</td>
</tr>
<tr>
<td>Basic pharmaceutical products</td>
<td>3</td>
</tr>
</tbody>
</table>

\(^1\) Due to rounding percentages add to >100%
Appendix B: Q2 Can you tell me how many employees do you have in your business?

- **1 to 9**: 16%
- **10 to 49**: 28%
- **50 to 99**: 17%
- **100 to 249**: 20%
- **250 to 999**: 12%
- **1000+**: 6%

Base 139: All respondents

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1 Due to rounding percentages add to >100%