

# Low Carbon Environmental Goods and Services Sector Study 2024: Local Authority Short Report for Stratford-upon-Avon District Council

Commissioned by the Midlands Net Zero Hub, this report provides 2024 data of the LCEGS sector, updating the 2021 study.

## 1. Introduction

This document has been prepared to provide an overview summary of the LCEGS sector within this Local Authority. Reports on the wider picture of the MNZH region and Coventry & Warwickshire, including skills forecasts relevant to this Local Authority, and datasets are available [here](#). Additional detailed data is available from kMatrix; and further recommendations and details on areas of focus are available through the Climate Action Benchmarking study.

## 2. Current Activity Supporting the Growth of the Sector

Activity at the Coventry & Warwickshire level relevant to the wider geographical region:

- There is support across the Warwickshire region to help businesses to decarbonise. Schemes such as the Business Energy Advice Service, the WM Net Zero Pledge and decarbonisation grants will help further drive the LCEGS sector, although more support and funding are needed in the future to maximise effectiveness.
- The WMCA region of which Coventry is also part has a very strong innovation sector including a number of funding projects and support networks, such as the West Midlands Innovation Programme. The Innovation Accelerator programme has offered £33m of funding for five projects, two of which directly support the LCEGS sector - "Clean Futures" and the "Biochar Cleantech Accelerator" - and offers a strong platform to drive innovation throughout the LCEGS supply chain.
- Energy Capital's work developing a Regional Energy Strategy and a Smart Energy Cluster will provide a useful direction of travel and an opportunity to collaborate for the region's diverse and otherwise disparate energy sector.

- The [Green Business Network](#) connects businesses in the LCEGS sector. Through it, LCEGS businesses can access expert guidance on energy and resource efficiency, networking and supply chain opportunities, access to grants and funding, and free energy and resource audits.

### 3. Recommendations

Recommendations for Stratford-upon-Avon District Council are:

- Take advantage of the automotive sector in Warwickshire by promoting, learning from and building upon the Supply Chain Transition Programme, which helps SMEs in the sector diversify their customer base by winning new orders in growing areas of the economy.
- Promote the use of local suppliers for low carbon product installations as part of funding schemes (such as insulation upgrades) and establish quality assurance procedures to ensure effectiveness and build trust in council-led schemes.
- Work with nearby local authorities to develop a strategy to better work with local skills providers, education institutions and LCEGS businesses to ensure training and apprenticeships are available that address the specific skills gaps in the area. This work could include pooling funding.
- Review procurement processes within the local authority and wider public sector to prioritise sustainable practices across the supply chain, thereby driving growth in the LCEGS sector. Shift focus from short term cost savings to longer term savings and consider savings to other budgets through procurement which brings social and environmental benefits.
- Contact the Midlands Net Zero Hub and request the supplementary booklet of additional data to provide further information and context to the LCEGS sector in your area.
- Large sub-sectors with the closest 3-year growth in Stratford-upon-Avon to the UK average and are considered strengths are:
  - Waste Management
  - Water Supply & Waste Water Treatment
  - Energy Management

These compare with a wider range of strengths in the wider Coventry & Warwickshire, which also includes Recovery & Recycling; Alternative Fuel Vehicle; Alternative Fuels; Building Technologies; Nuclear Power; and Geothermal. The Coventry & Warwickshire report and dataset includes details of the skills gaps across Coventry & Warwickshire for each sub-sector, providing evidence to feed into local skills plans, ideally formed in collaboration with neighbouring councils.

### 4. Headline Figures for Stratford-upon-Avon

The headline figures for the Stratford-upon-Avon District Council area are:

- The LCEGS sector in Stratford-upon-Avon was worth £547m in 2023/24 and is forecast to grow to £640m over the next 5 years
- The LCEGS sector accounts for 8.3% of GVA, 7.1% of employment, and sales accounts for 9.3% of GDP in Stratford-upon-Avon
- Stratford-upon-Avon’s LCEGS Sales generates 2.0% of the LCEGS Sales in the MNZH region, slightly higher than the 1.8% of total GDP contribution
- Stratford-upon-Avon’s LCEGS GVA generated 2.0% of the MNZH’s LCEGS GVA, slightly higher than its 1.8% total GVA contribution
- Stratford-upon-Avon’s LCEGS employment accounts for 2.3% of MNZH’s LCEGS employment, higher than its 1.4% of economically active people in the MNZH

### 5. Stratford-upon-Avon’s LCEGS Sector Key Metrics

Key metrics in Stratford-upon-Avon for each financial year from 2019/20 to 2023/24, with growth between years:

<b>Stratford-upon-Avon</b>	<b>2019/20</b>	<b>% growth</b>	<b>2020/21</b>	<b>% growth</b>	<b>2021/22</b>	<b>% growth</b>	<b>2022/23</b>	<b>% growth</b>	<b>2023/24</b>
Sales	£526.4m	-1.9%	£516.4m	1.4%	£523.9m	1.8%	£533.6m	2.6%	£547.3m
GVA	£418.4m	-1.9%	£410.5m	1.4%	£416.4m	1.9%	£424.2m	2.8%	£435.9m
# FTE Employees	4,827	-1.2%	4,767	1.5%	4,837	2.1%	4,939	2.4%	5,058
# Companies	218	-1.9%	214	1.7%	218	1.8%	221	2.7%	228

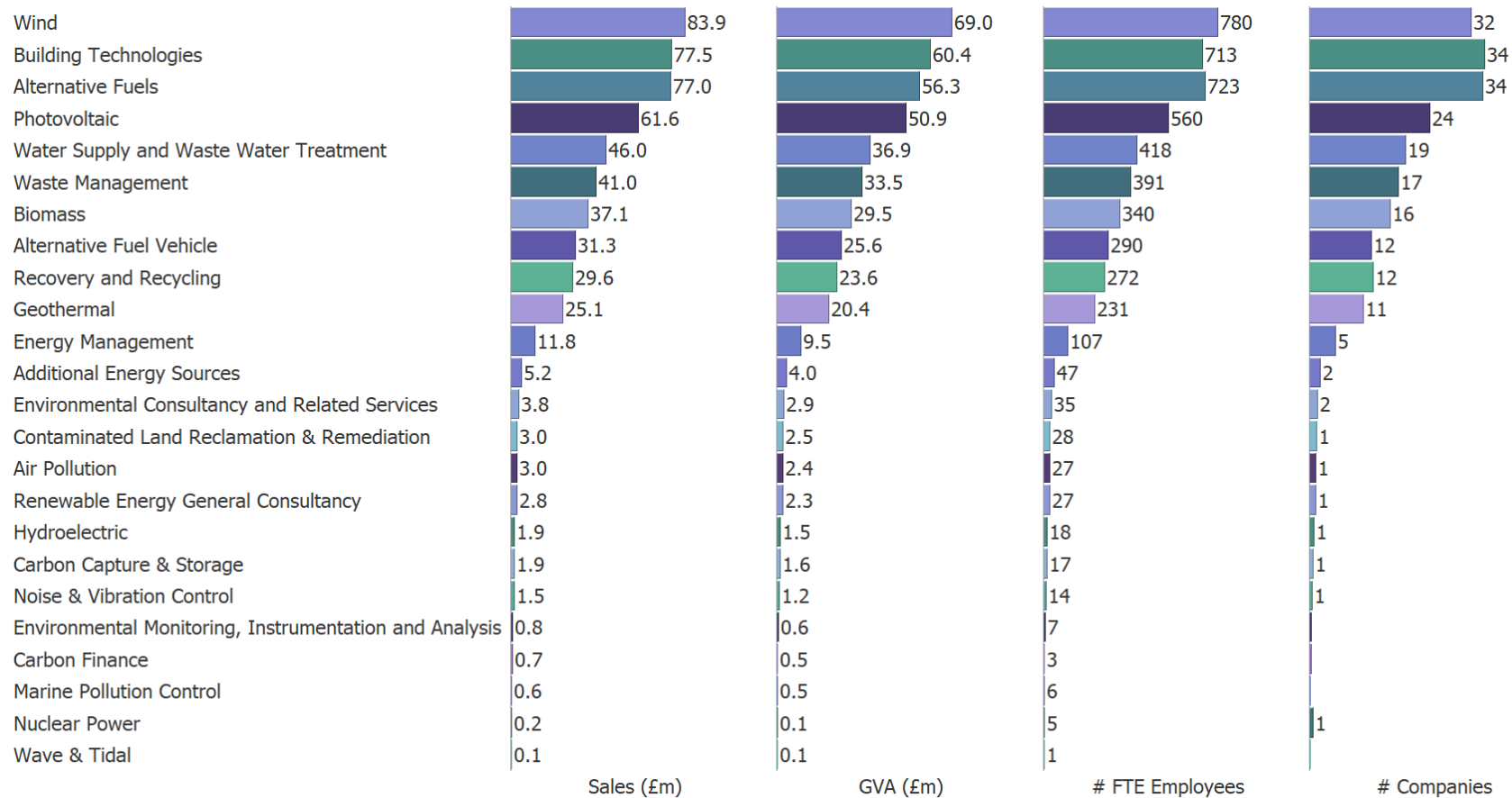
All metrics have recovered from the pandemic in 2020 and saw growth across the reporting period from 2021/22 to 2023/24.



## 6. Stratford-upon-Avon's Sub-sectors Key Metrics

All twenty-four sub-sectors of the LCEGS sector have activity in Stratford-upon-Avon, with the 2023/24 values for Sales, GVA, FTE Employees and number of companies in figure 1.

Figure 1: Sales, GVA, FTE Employees and number of companies in Stratford-upon-Avon in 2023/24 by sub-sector



The largest eleven sub-sectors account for 95% of sales, 95% of GVA, 95% of employment and 95% of companies in the LCEGS sector. These eleven sub-sectors are Wind; Building Technologies; Alternative Fuels; Photovoltaic; Water Supply & Waste Water Treatment; Waste Management; Biomass; Alternative Fuel Vehicle; Recovery & Recycling; Geothermal and Energy Management.

## 7. Stratford-upon-Avon’s Sub-sector Growth Compared with the UK

No sub-sectors saw stronger growth in sales than the UK average between 2021/22 and 2023/24, however, those were closest to the UK average in Stratford-upon-Avon include:

Sub-sector	Stratford-upon-Avon Sales 2023/24	Stratford-upon-Avon Growth 2021/22 to 2023/34	UK Growth 2021/22 to 2023/34
Air Pollution	£3.0m	4%	7%
Contaminated Land Reclamation & Remediation	£3.0m	4%	9%
Environmental Consultancy and Related Services	£3.8m	5%	11%
Waste Management	£41.0m	4%	8%
Water Supply and Waste Water Treatment	£46.0m	5%	5%
Energy Management	£11.8m	4%	10%
Renewable Energy General Consultancy	£2.8m	5%	7%

Only sub-sectors contributing more than 1% of the total Sales in Stratford-upon-Avon have been included in this table.

Of the seven sub-sectors closest to the UK average, Waste Management, Water Supply & Waste Water Treatment and Energy Management are also large sub-sectors and should be considered a strength of Stratford-upon-Avon.

## 8. MNZH Regional summary

Headline figures for the MNZH area are:

- The LCEGS sector in MNZH Region was worth £31.0bn in 2023/24 and is forecast to grow to £46.6bn over the next 5 years
- The LCEGS sector accounts for 7.4% of GVA, 4.2% of employment, and sales accounts for 8.3% of GDP in MNZH Region
- MNZH Region's LCEGS Sales generates 11.9% of the LCEGS Sales in the UK, slightly lower than the 12.4% of total GDP contribution
- MNZH Region's LCEGs employment accounts for 15.5% of the UK's LCEGS employment, lower than its 16.8% of economically active people in the UK
- Net Zero 2030 targets are expected to require between 30,192 and 146,162 FTE employees in addition to those employed now in the MNZH region
- Net Zero 2050 targets are expected to require between 263,907 and 727,184 FTE employees in addition to those employed now in the MNZH region
- The MNZH region's LCEGS sector could generate up to 727,184 jobs between 2023/24 and 2050\*
- Between 2019/20 and 2023/24, Investment in R&D for the LCEGS sector has varied, but is now similar, shrinking slightly from £2.2bn to £2.1bn for Private Equity Investment; being £3.6bn for Venture Capital Investment for both years; and increasing slightly from £4.9bn to £5.2bn for Other Investment.
- Exports in the LCEGS sector for MNZH Region have increased from £2.8bn in 2019/20 to £3.2bn in 2023/24.

\*The majority of increase from 2030 targets due to additional 20 years of wider economic growth

## 9. Coventry & Warwickshire summary

Headline figures for Coventry & Warwickshire are:

- The LCEGS sector in Coventry & Warwickshire was worth £3.9bn in 2023/24 and is forecast to grow to £5.6bn over the next 5 years
- The LCEGS sector accounts for 8.2% of GVA, 6.1% of employment, and sales accounts for 9.1% of GDP in Coventry & Warwickshire
- Coventry & Warwickshire's LCEGS Sales generates 12.4% of the LCEGS Sales in the MNZH region, higher than the 11.2% of total GDP contribution
- Coventry & Warwickshire's LCEGS GVA generated 12.4% of the MNZH's LCEGS GVA, higher than the 11.2% total GVA contribution
- Coventry & Warwickshire's LCEGS employment accounts for 13.7% of MNZH's LCEGS employment, higher than its 9.5% of economically active people in the MNZH
- Net Zero 2030 targets are expected to require between 5,754 and 21,426 FTE employees in addition to those employed now in Coventry & Warwickshire
- Net Zero 2050 targets are expected to require between 28,998 and 100,014 FTE employees in addition to those employed now in Coventry & Warwickshire
- Coventry & Warwickshire's LCEGS sector could generate up to 100,014 jobs between 2023/24 and 2050\*
- Between 2019/20 and 2023/24, Investment in R&D for the LCEGS sector has grown from £167m to £278m for Private Equity Investment; £330m to £467m for Venture Capital Investment; and £483m to £647m for Other Investment.
- Exports in the LCEGS sector for Coventry & Warwickshire have increased from £350m in 2019/20 to £405m in 2023/24.

\*The majority of increase from 2030 targets due to additional 20 years of wider economic growth

## 10. Example Companies in Stratford-upon-Avon

Examples companies in Stratford-upon-Avon.

Note: Some or all of the company's activity and employment are either currently in the LCEGS sector or have the potential to be. In some cases, turnover and/or employment may include activity in other locations.

Company Name:	<b>Hartle Limited</b>
Web:	<a href="https://hartle-ltd.co.uk/">https://hartle-ltd.co.uk/</a>
Employees:	16
SIC Codes:	Plumbing, heat and air-conditioning installation
About the company:	“Hartle Limited has delivered bespoke building mechanical solutions for over 30 years. Offering a diverse range of specialist services including design, build, heating, ventilation, maintenance and plumbing, Hartle has earned its reputation of delivering high-quality projects with exceptional attention to detail. A testament to this approach is our Achilles Building Confidence Level 5 accreditation.”
Company Name:	<b>Environmental Instruments Limited</b>
Web:	<a href="https://www.aqmesh.com/">https://www.aqmesh.com/</a>
Employees:	13
SIC Codes:	Manufacture of electronic instruments and appliances for measuring, testing, and navigation, except industrial process control equipment



Additional Products and Services: Outdoor air quality monitoring systems

About the company:

“Outdoor air quality monitoring system with MCERTS Indicative certification for PM2.5 and PM10, ideal for fenceline monitoring, air pollution measurement, environmental monitoring and industrial pollution monitoring across mining, construction and oil & gas facilities.”