

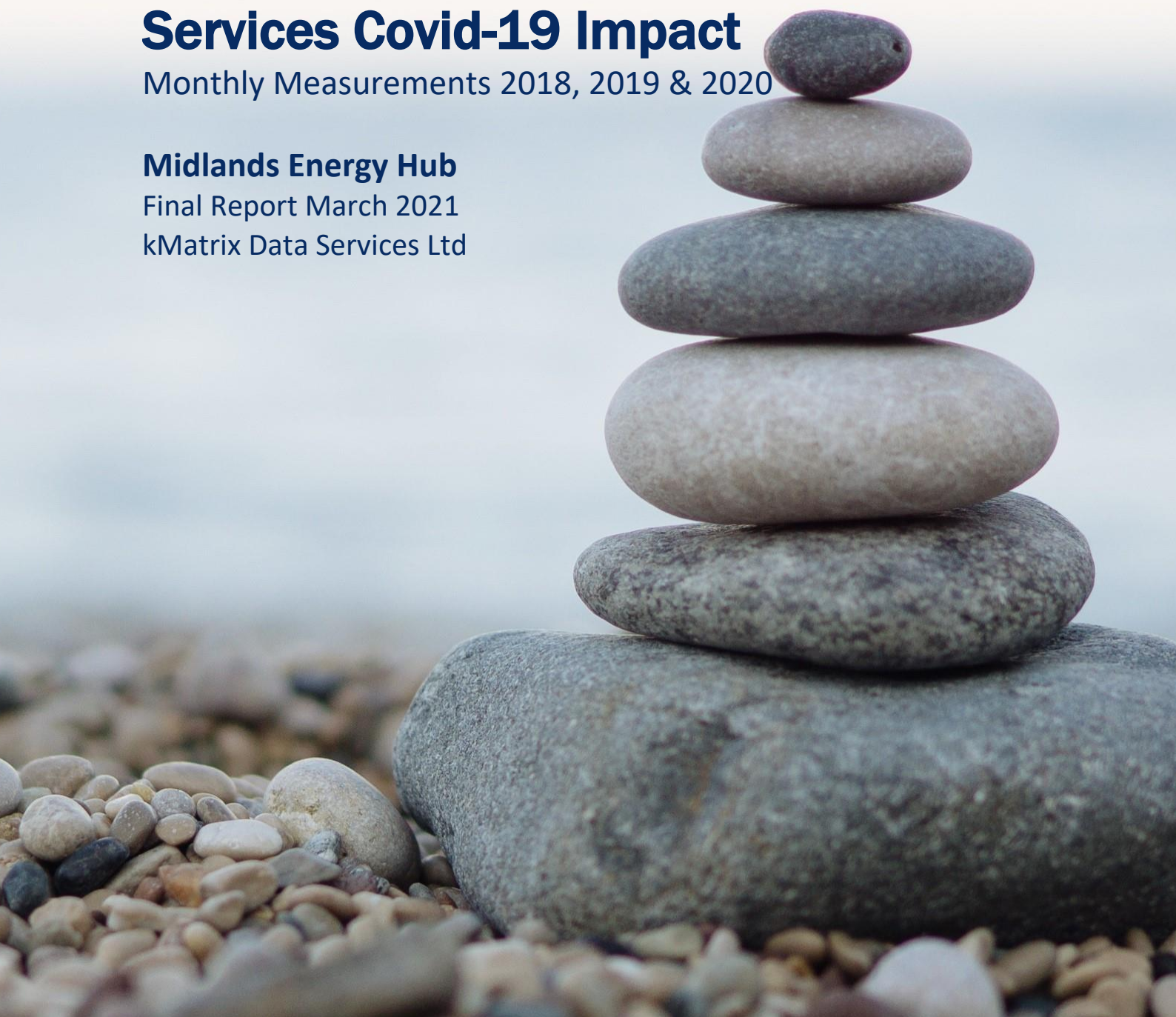
Midlands Region and LEPs Low Carbon Environmental Goods and Services Covid-19 Impact

Monthly Measurements 2018, 2019 & 2020

Midlands Energy Hub

Final Report March 2021

kMatrix Data Services Ltd



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Project Overview

The Low Carbon and Environmental Goods and Services sector study was commissioned by Nottingham City Council on behalf of the Midlands Energy Hub, sponsored by the Department of Business, Energy and Industrial Strategy (BEIS), and its stakeholders across the Midlands including the Local Enterprise Partnerships (LEPs) and Local Authorities.

The study was commissioned in November 2020 and awarded to kMatrix Data Services Ltd and Sustainability West Midlands, with the aim of understanding the current state of the sector, where support is needed to help grow the sector across the Midlands from a Local Authority level to a regional level and the role the sector can play to drive a low-carbon recovery from Covid-19.

The UK has a clear commitment to clean growth, where the economy continues to grow while reducing greenhouse gas emissions. The commitments are set out in the Industrial Strategy and the Clean Growth Strategy. The UK has a strong record of clean growth, cutting carbon emissions by 42% between 1990 and 2015, while experiencing a 67% increase in GDP during the same period, in contrast to the G7 emissions reduction of 3% and GDP increase of 61%¹. This has been achieved through a variety of strategies including improved energy efficiency, increased recycling of waste products and improved automobile engine technology, with the largest contribution in reduction of emissions from the decarbonisation of power. The UK now has the largest installed offshore wind capacity in the world².

Although the UK is arguably a world leader in clean growth, there is an ongoing need for further development across multiple sectors to deliver on the low carbon economy commitments both local and central government are pursuing. LEPs in the Midlands are fully cognizant of the need to support and further develop the green economy, as set out in their Energy Strategies and Local Industrial Strategies.

The study is grounded in evidenced data provided by the kMatrix big data analytical tool, which has been used to inform the nature of the sector across the Midlands region, in a number of sub-sectors. The data has been used alongside desk research, documentation review, stakeholder engagement and collaboration with partners and the awarding authority to produce a series of reports constituting an evidence base of both quantitative and qualitative evidence. This evidence not only informs policy recommendations as an integral part of the study, but also acts as a baseline from which progress can be measured post Covid-19 and into the future.

The study involved the production of a quantitative evidence base led by kMatrix and a qualitative evidence-base led by Sustainability West Midlands with findings from each workstream enriching the evidence of the other. By full collaboration between partners, the project steering group and stakeholders, the evidence base produced by the project delivers a comprehensive overview of the LCEGS market, with detailed information at the LEP and Local Authority levels. The wider relevance to the green recovery and national commitment to net zero by 2050 have been considered throughout the work and are integral to the policy recommendations and growth forecasts made during the study.

¹https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/700496/clean-growth-strategy-correction-april-2018.pdf

² <https://gwec.net/global-figures/global-offshore/>

Report Introduction

This report has been produced as part of the Low Carbon and Environmental Goods & Services Sector study for the Midlands Energy Hub, commissioned in November 2020.

The data in this report are produced using the kMatrix Big Data Analytical Tool, with full methodology paper delivered to the Midlands Energy Hub (MEH).

This full timeseries data is a monthly measurement of the LCEGS sector and from January 2018 to December 2020.

The data within the final Covid-19 report has been used as an integral part of the evidence base to liaise with stakeholders and assist to inform policy recommendations to the MEH as part of the overall project.

The data to October 2020 was pre-released as an interim report and this report completes the time series. As with the interim report, this report contains limited analysis and discussion, with the purpose to inform of the impact on the sector during 2020, with more detailed analysis within the wider study reporting.

The report itself covers the impact of the Covid pandemic on the Midlands Energy Hub area overall, with the impact on individual LEPs reported in nine appendices.

The LEP appendices report the state of the LCEGS sector over a three-year timeseries for the geographical area addressed by the LEP. Some LEPs share Local Authorities with other LEPs, for example Hinckley and Bosworth is served by both Coventry and Warwick LEP and Leicester and Leicestershire LEP. Likewise, Bromsgrove, Redditch and Wyre Forest are all served by both Greater Birmingham and Solihull LEP and Worcestershire LEP.

As such, the LEP appendices are valuable for use by the LEPs and include all geographical areas they cover. However, if the totals of all the LEPs were summed, there would be double-counting. For this reason, the main body of the report is for the Midland's Energy Hub as a whole, with no double counting and the LEPs themselves are placed in appendices.

Data Introduction

The data produced on a monthly basis varies slightly to that produced for the annual measurements. This is partly because we have to exclude sources we would usually use who report on a 3-month, 6-month or annual basis and only use those who report figures on a monthly basis.

Sales

The figures for Sales reported for a financial year in the annual reports will be slightly different to those you would have if you summed the sales figures for the months of April-March of the same financial year in this report.

This is partly due to the calculations being triangulated from slightly different sources, but also due to variation in the length of contracts (payment terms varying between 14 and 90 days) and different accounting practices being smoothed for the annual measurements and conversely having more effect on the monthly reporting.

During a normal year, the sales figures (and other metrics) vary from month to month. It is expected, in a sector of this size, that the sales figures per month can and do fluctuate by +/- 20% for a single month. This is due to large contracts being undertaken or coming to an end having a larger impact on the sector in this region than would be seen in larger markets (e.g., London). Although you do expect the monthly figures to fluctuate, you do not expect a consistent contraction, ordinarily a large contraction would be followed by expansion as new contracts are taken up.

It is worth noting that annual measurements have indicated the LCEGS sector has seen growth year-on-year, despite monthly fluctuations.

Employees

Employee figures refer to 'active employment', they do not take into account any furlough scheme and as such, any drop in employee numbers indicate those employees who have been furloughed along with job losses.

Companies

The number of companies listed are those who have actively traded in the month being reported. This figure is useful to keep track of the number of companies active in the sector each month, but again, if an average of companies is taken across a financial year, or the company count for one month is used, it does not represent the annual LCEGS company count. This is because many companies within the LCEGS sector are active in many other sectors and in some cases are predominantly based in other sectors, only providing products and services (often in the network of supply) on an infrequent basis. As such, they may be active during only one or two monthly reporting periods but are 'replaced' in the figures by other companies who provide products and services on an ad hoc basis. As a result, the annual reports provided during this study provide realistic numbers of companies who have traded across the whole year, while the counts in this report illustrate those who have been active during each month.

Interplay between Sales, Employees and Companies

The relationship between Sales, Employees and Companies can be complex and they do not necessarily follow a common growth trajectory. It is not uncommon for there to be slower growth in one metric than the other two.

Many factors can influence the growth rates of all three metrics, for example, a delay in employment growth would be expected after a peak in sales as companies determine whether a rise in sales is likely to be long term and able to sustain more employees. Sustained increase in demand may lead to an increase in employment, or may lead to investment in efficiencies without the associated increase in employment.

Another example would be improved efficiencies in both the chain and networks of supply which can lead to employment levels decreasing as well as sales values increasing.

Profit margins can increase as a result of increased efficiencies, and as these increase, the company can invest more or reduce borrowings, they can also potentially expand and employ more people, but do not necessarily do so.

Continued reduction in Sales despite recovery in some other sectors in the UK

The LCEGS sector in the UK has experienced a fall in Sales month on month from March to October. This is despite other sectors in the UK seeing a large fall in turnover in March, followed by a large increase in subsequent months. The LCEGS sector has not begun to recover yet and this is for a number of reasons which include:

Some contracts have ended and have not been replaced with new contracts

Decision making times are generally much longer due to the uncertainty, delaying the onset of new contracts

There have been unintentional effects of the rollout of the new Green Deal. A delay between announcing new government-backed incentives to drive the green economy and the implementation of the grant schemes to deliver it, effectively stalled the market. An example is in the energy efficiency market, where companies have provided quotes, been informed of the intent to purchase before the announcement, followed by the client understandably delaying the purchase to make use of the scheme.

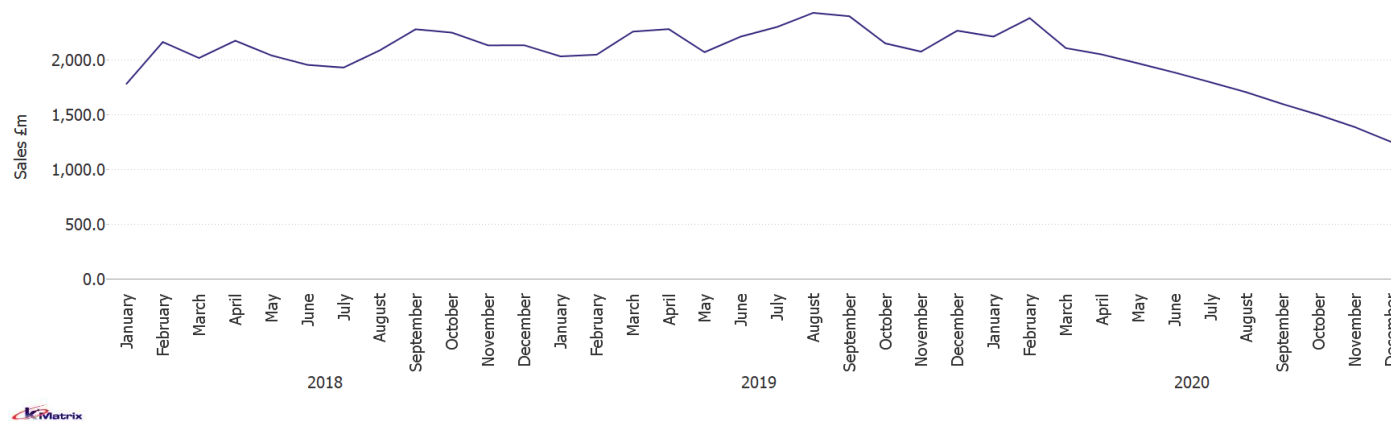
A note on Employee and Company numbers

The reduction in company and employee numbers is a reflection of the numbers active in the LCEGS sector in that month. A reduction in numbers does not necessarily equate to company and job losses, they may be providing services to other sectors until the LCEGS market improves.

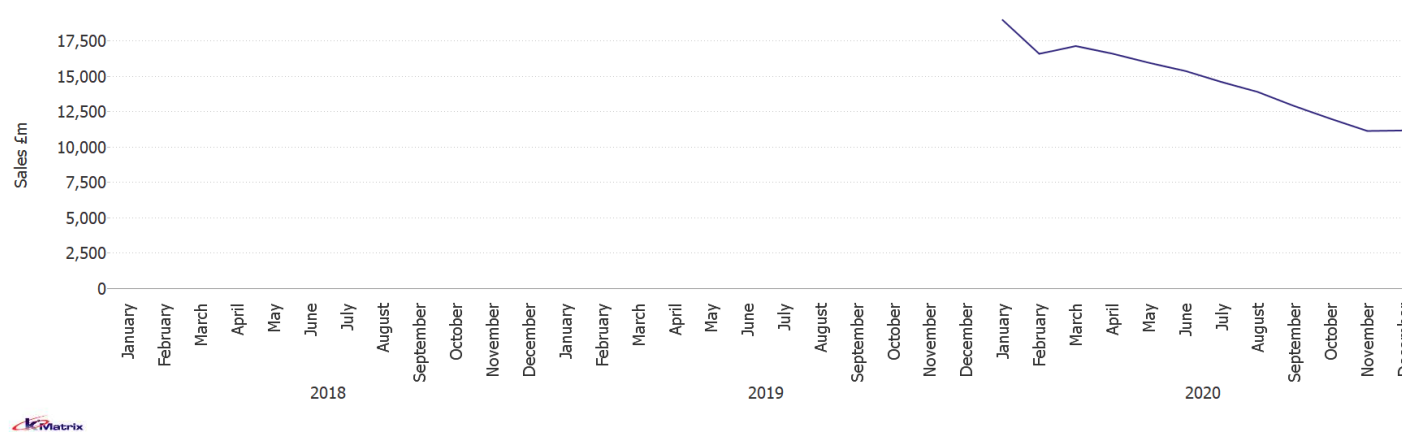
1. LCEGS graphs and tables for the Midlands Energy Hub Region

1.1 LCEGS Midlands Energy Hub Region Line Graphs - Sector

MEH LCEGS Sales by month from January 2018 through to December 2020



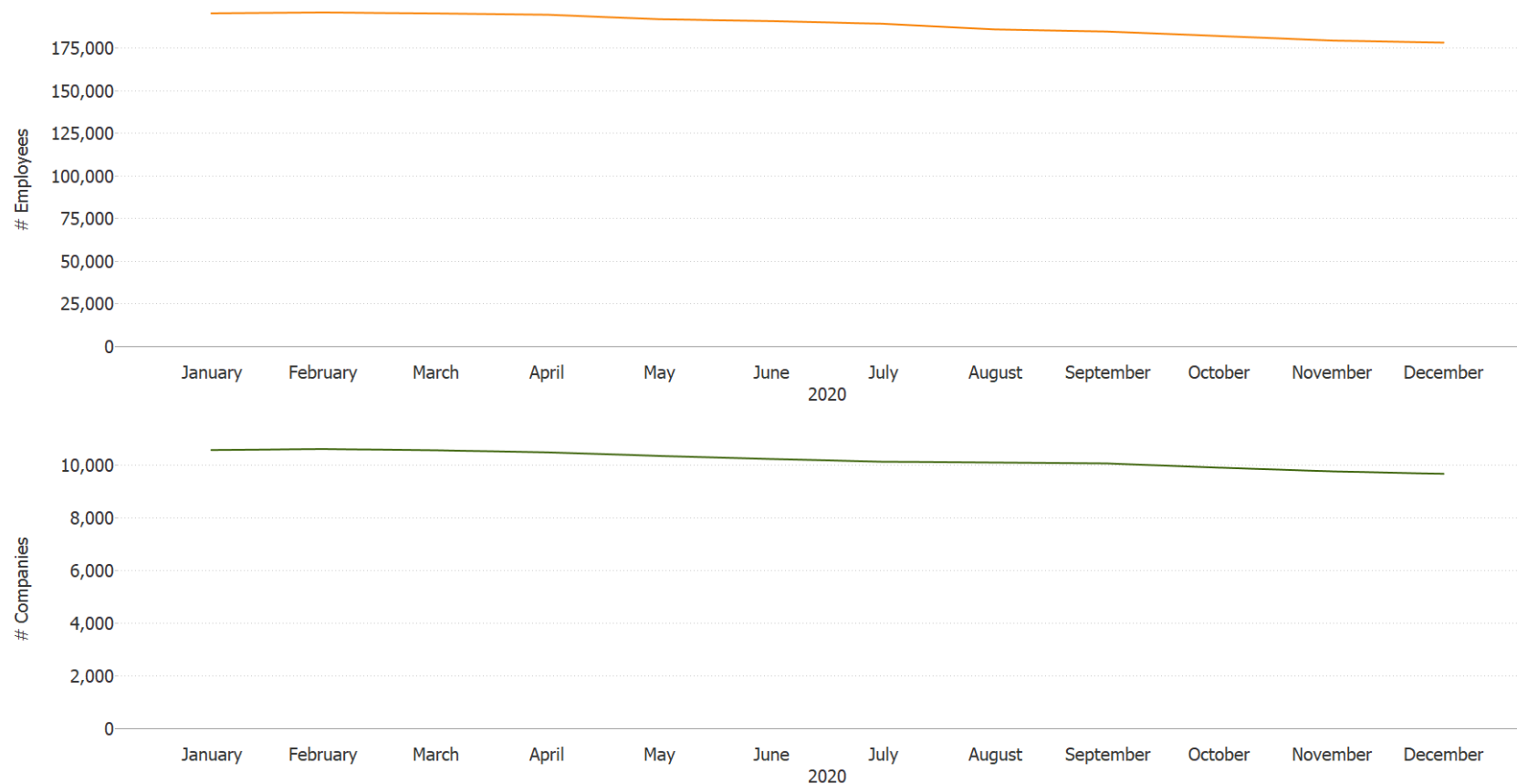
UK LCEGS Sales by month from January 2018 through to December 2020



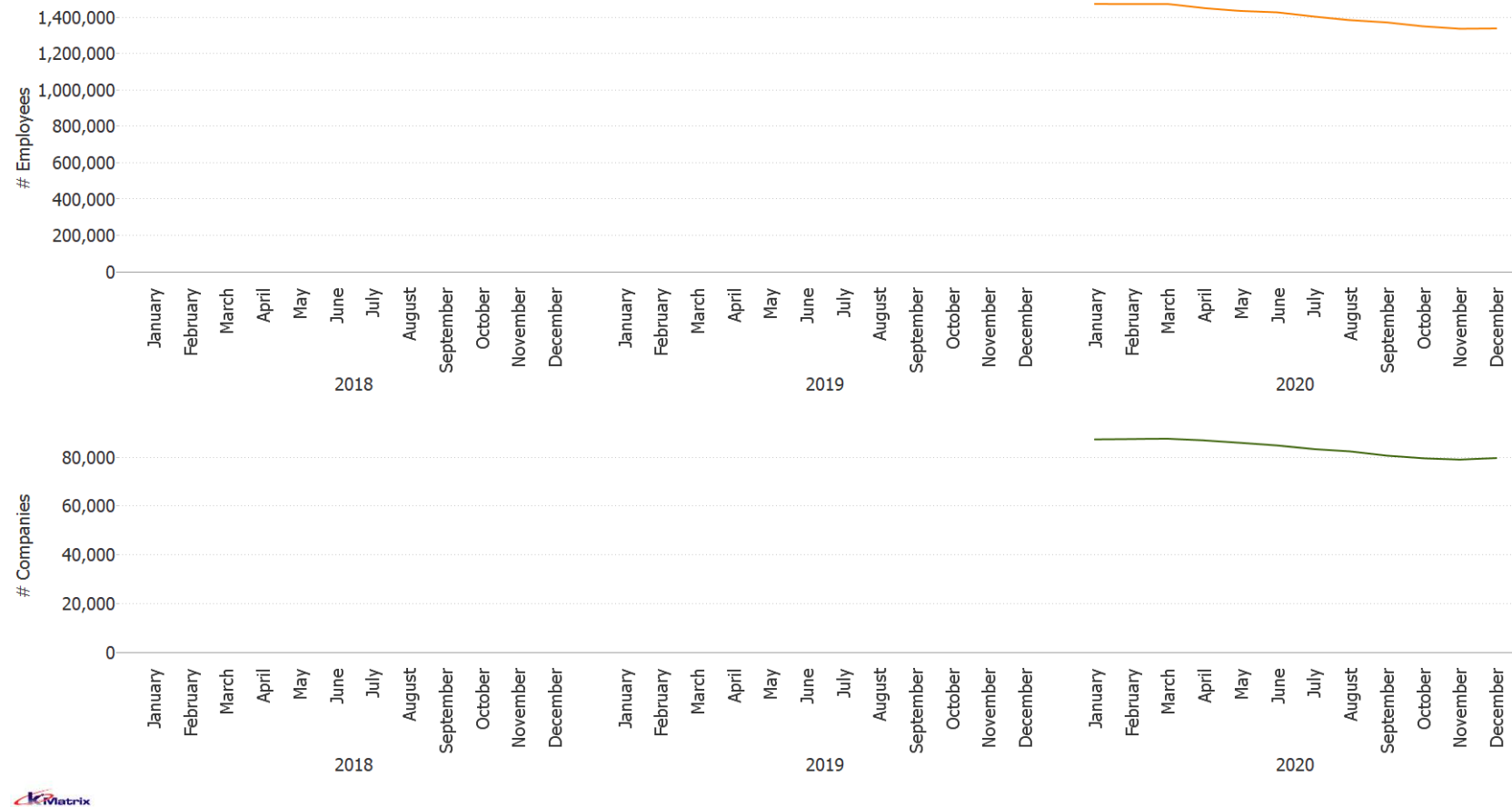
The variability of the sales value per month is normal and to be expected, what we can see is that a line of best fit would indicate overall growth in the sector between January 2018 and March 2020, followed by the contraction of the sector from March onwards. The UK saw levelling off in December.

MEH LCEGS Number of Employees and Companies by month from January 2020 through to December 2020

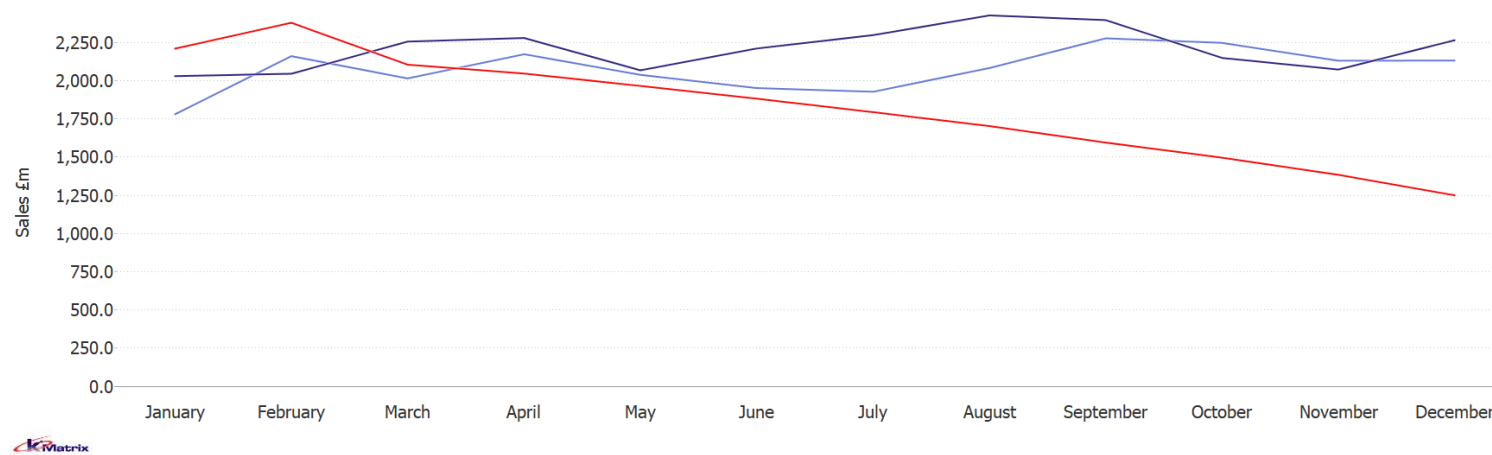
Monthly company and employee figures do fluctuate slightly month-to-month, in a normal year, however the continued decline from March onwards is not normal.



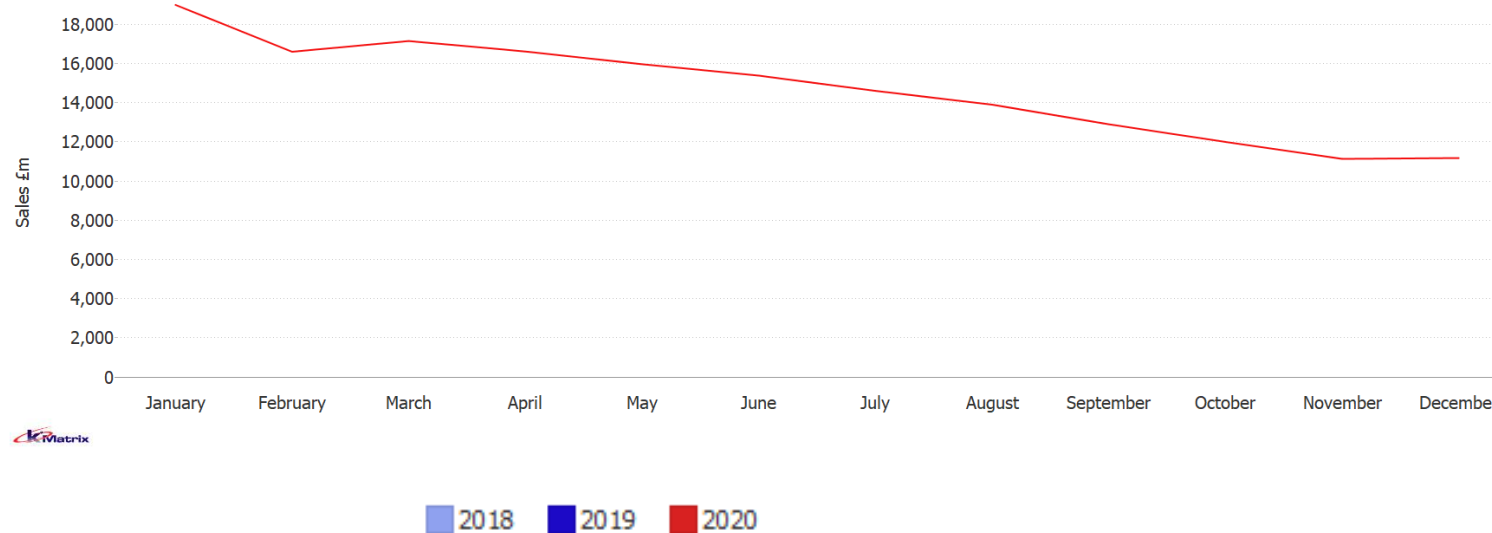
UK LCEGS Number of Employees and Companies by month from January 2020 through to December 2020



MEH LCEGS Sales by month, split by calendar year

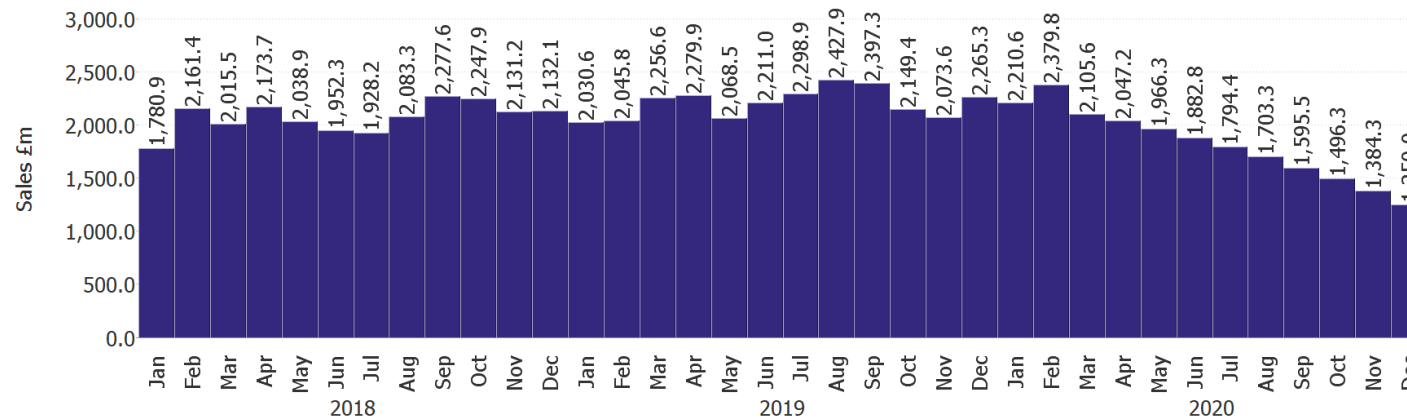


UK LCEGS Sales by month, split by calendar year

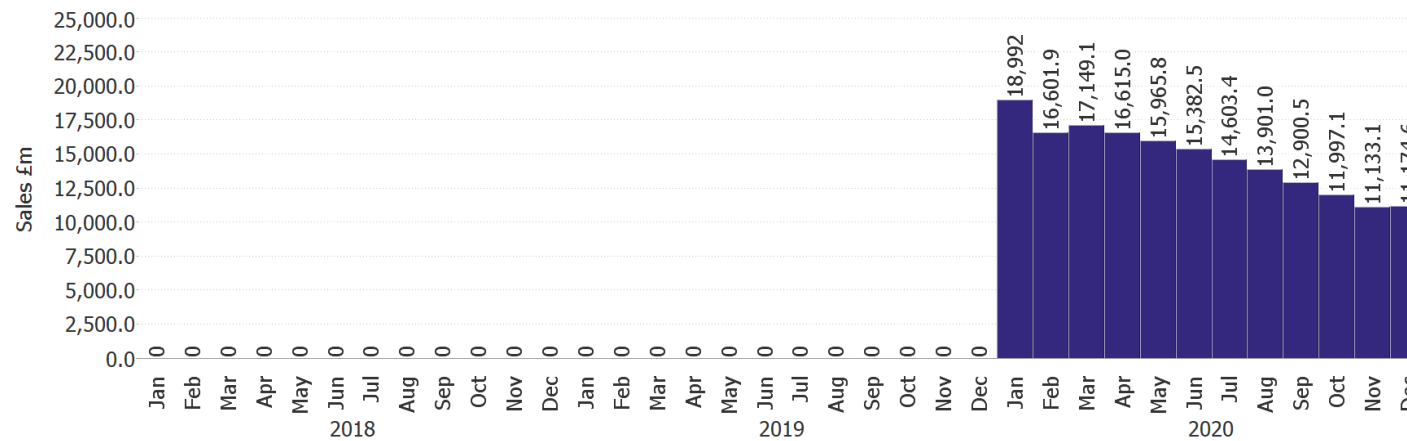


1.2 LCEGS Midlands Energy Hub Region Histograms - Sector

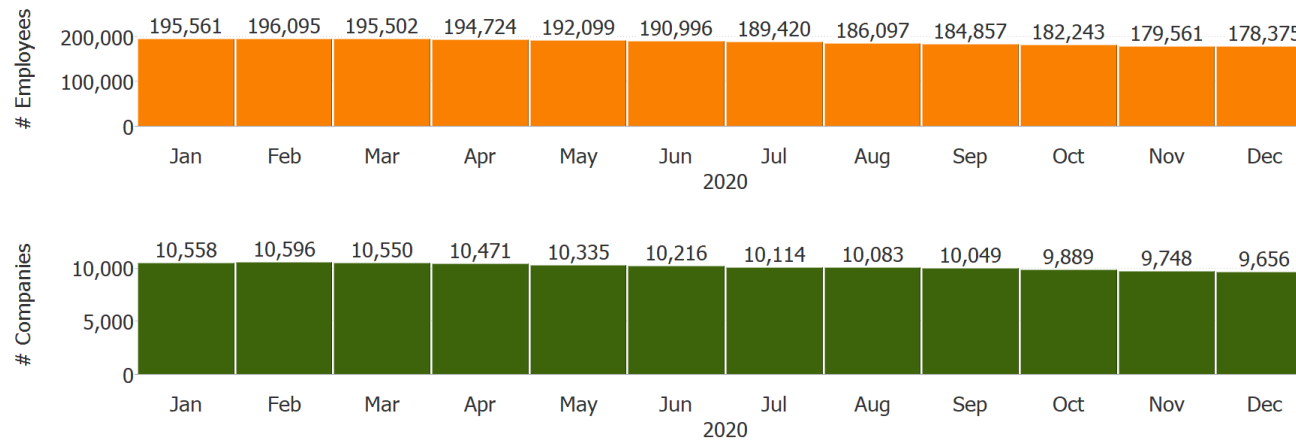
MEH LCEGS Sales



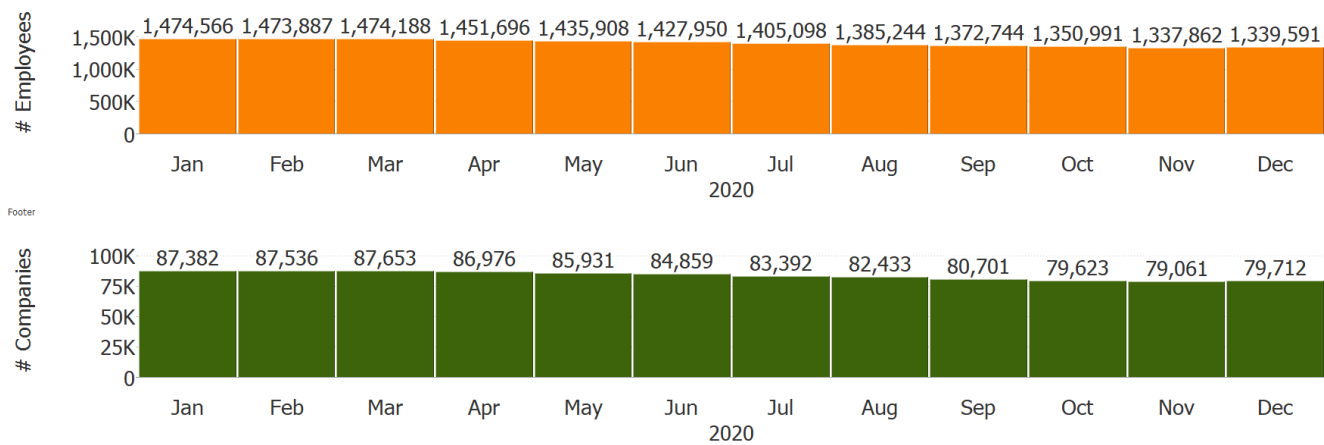
UK LCEGS Sales – 2020 only



MEH LCEGS Number of Employees and Companies



UK LCEGS Number of Employees and Companies



Footer



1.3 LCEGS Midlands Energy Hub Region Data Tables - Sector

MEH LCEGS Comparing Growth in Consecutive Months - Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	1,780.9	-	2,030.6	-4.8%	2,210.6	-2.4%
February	2,161.4	21.4%	2,045.8	0.7%	2,379.8	7.7%
March	2,015.5	-6.8%	2,256.6	10.3%	2,105.6	-11.5%
April	2,173.7	7.8%	2,279.9	1.0%	2,047.2	-2.8%
May	2,038.9	-6.2%	2,068.5	-9.3%	1,966.3	-4.0%
June	1,952.3	-4.2%	2,211.0	6.9%	1,882.8	-4.2%
July	1,928.2	-1.2%	2,298.9	4.0%	1,794.4	-4.7%
August	2,083.3	8.0%	2,427.9	5.6%	1,703.3	-5.1%
September	2,277.6	9.3%	2,397.3	-1.3%	1,595.5	-6.3%
October	2,247.9	-1.3%	2,149.4	-10.3%	1,496.3	-6.2%
November	2,131.2	-5.2%	2,073.6	-3.5%	1,384.3	-7.5%
December	2,132.1	0.0%	2,265.3	9.2%	1,250.0	-9.7%
Total	24,922.9		26,504.8		21,816.1	

Note: the -11.5% reduction between February and March 2020 is likely to be usual market fluctuation, the consistent reduction from April onwards is indicative of the impact of Covid-19.

UK LCEGS Comparing Growth in Consecutive Months - Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	-	-	-	-	18,992.3	-
February	-	-	-	-	16,601.9	-12.6%
March	-	-	-	-	17,149.1	3.3%
April	-	-	-	-	16,615.0	-3.1%
May	-	-	-	-	15,965.8	-3.9%
June	-	-	-	-	15,382.5	-3.7%
July	-	-	-	-	14,603.4	-5.1%
August	-	-	-	-	13,901.0	-4.8%
September	-	-	-	-	12,900.5	-7.2%
October	-	-	-	-	11,997.1	-7.0%
November	-	-	-	-	11,133.1	-7.2%
December	-	-	-	-	11,174.6	0.4%
Total	-		-		176,416.3	

The UK data shows a slight positive growth for December, which could be the first stages of sector recovery. It is not unexpected that the Midlands Energy Hub region shows a slight delay in the levelling off of the sector.

MEH LCEGS Comparing Growth in Consecutive Months – Employees

Month	Employees 2018	% Growth	Employees 2019	% Growth	Employees 2020	% Growth
January	176,659	-	185,969	-0.1%	195,561	-0.2%
February	176,087	-0.3%	185,976	0.0%	196,095	0.3%
March	176,218	0.1%	185,827	-0.1%	195,502	-0.3%
April	186,289	5.7%	196,033	5.5%	194,724	-0.4%
May	186,382	0.0%	195,387	-0.3%	192,100	-1.3%
June	186,598	0.1%	195,604	0.1%	190,996	-0.6%
July	185,824	-0.4%	196,048	0.2%	189,420	-0.8%
August	186,551	0.4%	195,998	0.0%	186,097	-1.8%
September	186,752	0.1%	196,139	0.1%	184,857	-0.7%
October	187,128	0.2%	195,283	-0.4%	182,243	-1.4%
November	186,151	-0.5%	195,123	-0.1%	179,561	-1.5%
December	186,155	0.0%	195,916	0.4%	178,375	-0.7%

UK LCEGS Comparing Growth in Consecutive Months – Employees

Month	Employees 2018	% Growth	Employees 2019	% Growth	Employees 2020	% Growth
January	-	-	-	-	1,474,566	-
February	-	-	-	-	1,473,887	0.0%
March	-	-	-	-	1,474,188	0.0%
April	-	-	-	-	1,451,696	-1.5%
May	-	-	-	-	1,435,908	-1.1%
June	-	-	-	-	1,427,950	-0.6%
July	-	-	-	-	1,405,098	-1.6%
August	-	-	-	-	1,385,244	-1.4%
September	-	-	-	-	1,372,744	-0.9%
October	-	-	-	-	1,350,991	-1.6%
November	-	-	-	-	1,337,862	-1.0%
December	-	-	-	-	1,339,591	0.1%

UK sector employee figures show a slight increase December, which is not seen in the Midlands Energy Hub region yet.

MEH LCEGS Comparing Growth in Consecutive Months – Companies

Month	Companies 2018	% Growth	Companies 2019	% Growth	Companies 2020	% Growth
January	9,510	-	9,865	-0.1%	10,558	-0.1%
February	9,518	0.1%	9,884	0.2%	10,596	0.4%
March	9,529	0.1%	9,852	-0.3%	10,550	-0.4%
April	9,876	3.6%	10,552	7.1%	10,471	-0.7%
May	9,873	0.0%	10,513	-0.4%	10,335	-1.3%
June	9,877	0.0%	10,563	0.5%	10,216	-1.1%
July	9,877	0.0%	10,546	-0.2%	10,114	-1.0%
August	9,840	-0.4%	10,545	0.0%	10,083	-0.3%
September	9,915	0.8%	10,527	-0.2%	10,049	-0.3%
October	9,890	-0.3%	10,534	0.1%	9,889	-1.6%
November	9,861	-0.3%	10,548	0.1%	9,748	-1.4%
December	9,870	0.1%	10,565	0.2%	9,656	-0.9%

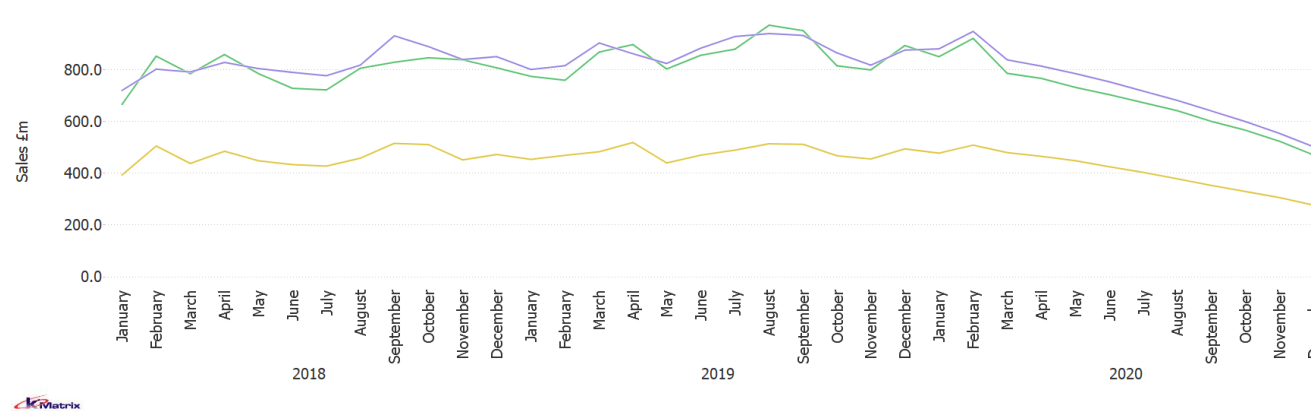
UK LCEGS Comparing Growth in Consecutive Months – Companies

Month	Companies 2018	% Growth	Companies 2019	% Growth	Companies 2020	% Growth
January	-	-	-	-	87,382	-
February	-	-	-	-	87,536	0.2%
March	-	-	-	-	87,653	0.1%
April	-	-	-	-	86,976	-0.8%
May	-	-	-	-	85,931	-1.2%
June	-	-	-	-	84,859	-1.2%
July	-	-	-	-	83,392	-1.7%
August	-	-	-	-	82,433	-1.2%
September	-	-	-	-	80,701	-2.1%
October	-	-	-	-	79,623	-1.3%
November	-	-	-	-	79,061	-0.7%
December	-	-	-	-	79,712	0.8%

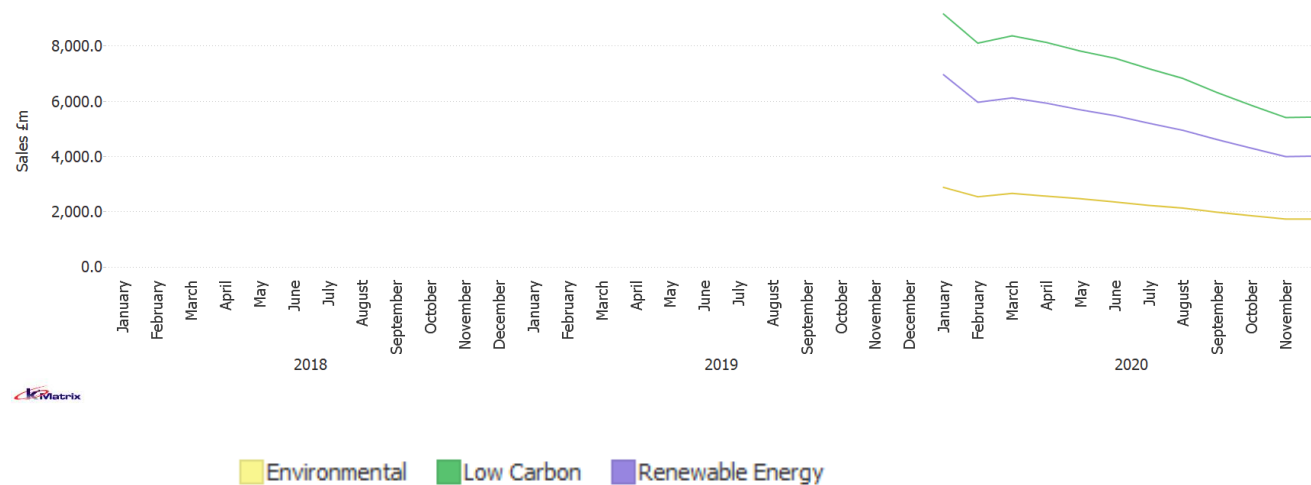
UK sector company figures show a slight increase December, which is not seen in the Midlands Energy Hub region yet.

1.4 LCEGS Midlands Energy Hub Region Line Graphs – Level 1

MEH LCEGS Sales by month from January 2018 through to December 2020 – split by Level 1

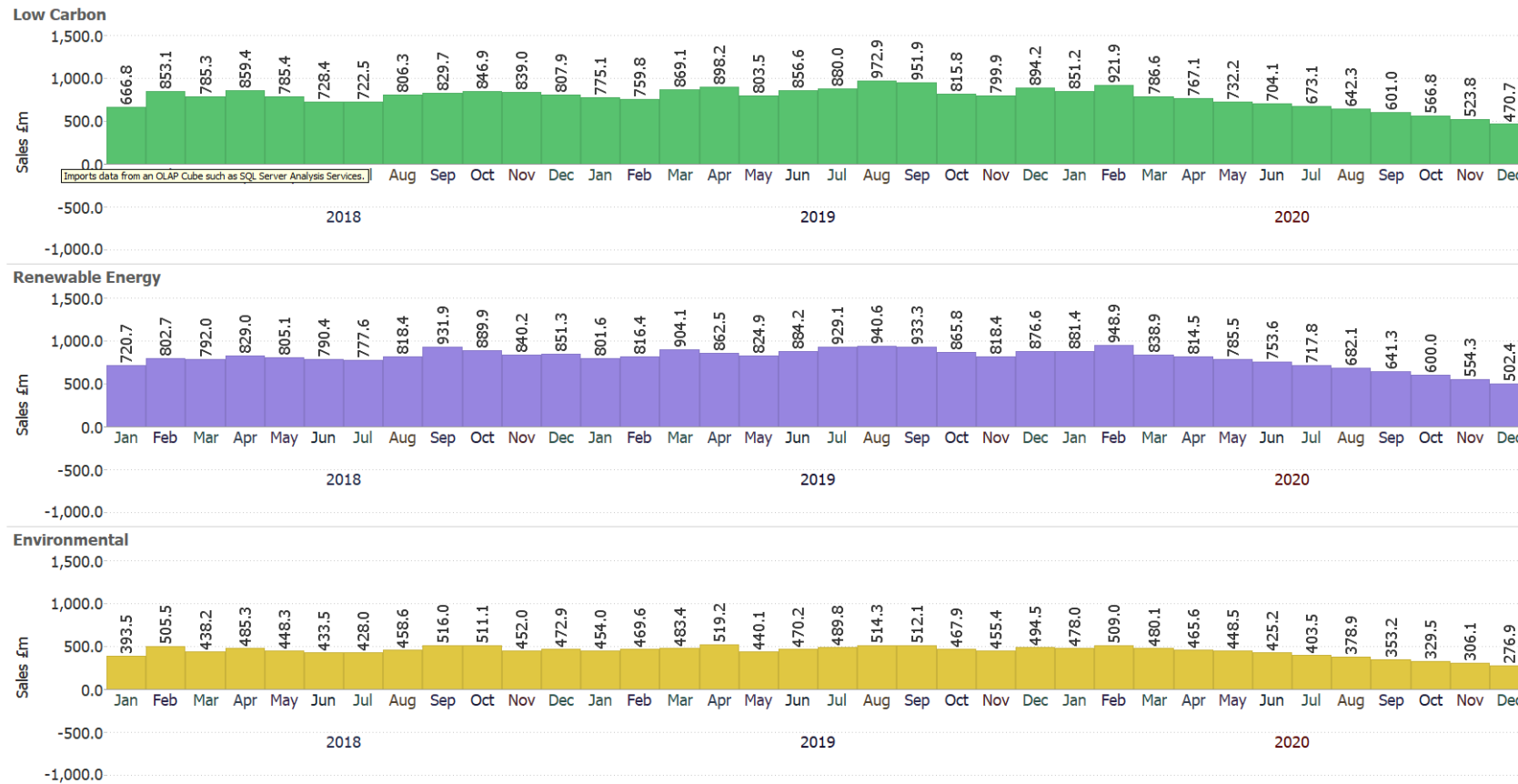


UK LCEGS Sales by month from January 2018 through to December 2020 – split by Level 1



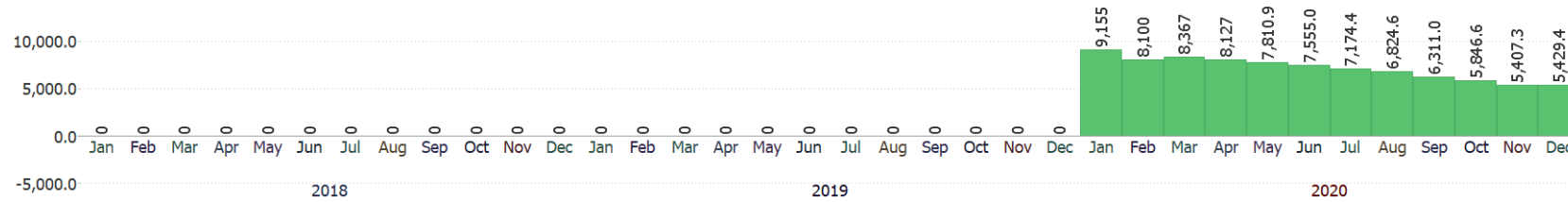
1.5 LCEGS Midlands Energy Hub Region Histograms – Level 1

MEH LCEGS Level 1 Sales

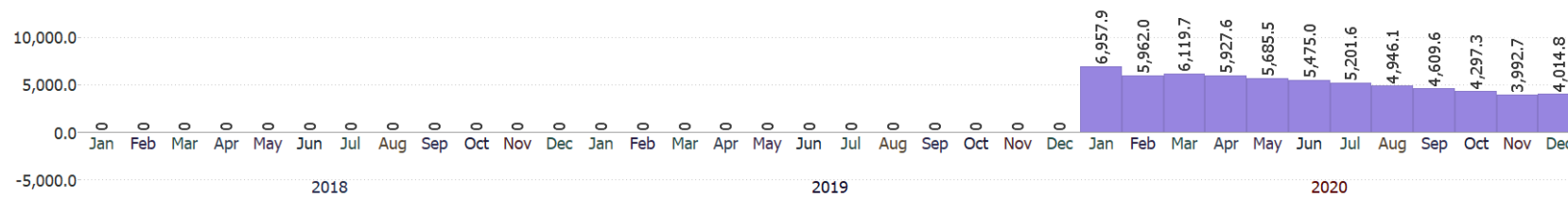


UK LCEGS Level 1 Sales

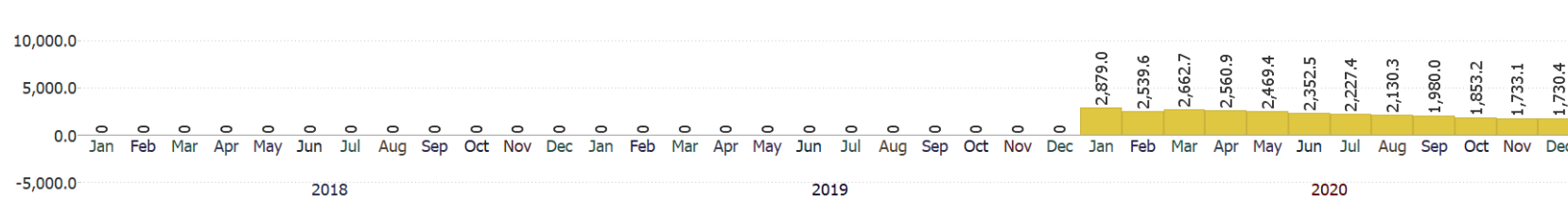
Low Carbon



Renewable Energy



Environmental



1.6 LCEGS Midlands Energy Hub Region Data Tables – Level 1 & 2 – Sales only

MEH LCEGS Comparing Growth in Consecutive Months – Low Carbon Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	666.8	-	775.1	-4.1%	851.2	-4.8%
February	853.1	27.9%	759.8	-2.0%	921.9	8.3%
March	785.3	-8.0%	869.1	14.4%	786.6	-14.7%
April	859.4	9.4%	898.2	3.3%	767.1	-2.5%
May	785.4	-8.6%	803.5	-10.5%	732.2	-4.5%
June	728.4	-7.3%	856.6	6.6%	704.1	-3.8%
July	722.5	-0.8%	880.0	2.7%	673.1	-4.4%
August	806.3	11.6%	972.9	10.6%	642.3	-4.6%
September	829.7	2.9%	951.9	-2.2%	601.0	-6.4%
October	846.9	2.1%	815.8	-14.3%	566.8	-5.7%
November	839.0	-0.9%	799.9	-2.0%	523.8	-7.6%
December	807.9	-3.7%	894.2	11.8%	470.7	-10.1%
Total	9,530.9		10,276.9		8,240.8	

UK LCEGS Comparing Growth in Consecutive Months – Low Carbon Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	-	-	-	-	9,155.39	-
February	-	-	-	-	8,100.29	-11.5%
March	-	-	-	-	8,366.67	3.3%
April	-	-	-	-	8,126.53	-2.9%
May	-	-	-	-	7,810.90	-3.9%
June	-	-	-	-	7,555.01	-3.3%
July	-	-	-	-	7,174.36	-5.0%
August	-	-	-	-	6,824.56	-4.9%
September	-	-	-	-	6,311.04	-7.5%
October	-	-	-	-	5,846.59	-7.4%
November	-	-	-	-	5,407.3	-7.5%
December	-	-	-	-	5,429.4	0.4%
Total	-	-	-	-	86,108.0	

MEH LCEGS Comparing Growth in Consecutive Months – Renewable Energy Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	720.7	-	801.6	-5.8%	881.4	0.5%
February	802.7	11.4%	816.4	1.8%	948.9	7.7%
March	792.0	-1.3%	904.1	10.8%	838.9	-11.6%
April	829.0	4.7%	862.5	-4.6%	814.5	-2.9%
May	805.1	-2.9%	824.9	-4.4%	785.5	-3.6%
June	790.4	-1.8%	884.2	7.2%	753.6	-4.1%
July	777.6	-1.6%	929.1	5.1%	717.8	-4.8%
August	818.4	5.2%	940.6	1.2%	682.1	-5.0%
September	931.9	13.9%	933.3	-0.8%	641.3	-6.0%
October	889.9	-4.5%	865.8	-7.2%	600.0	-6.4%
November	840.2	-5.6%	818.4	-5.5%	554.3	-7.6%
December	851.3	1.3%	876.6	7.1%	502.4	-9.4%
Total	9,849.1		10,457.5		8,720.8	

UK LCEGS Comparing Growth in Consecutive Months – Renewable Energy Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	-	-	-	-	6,957.89	-
February	-	-	-	-	5,962.01	-14.3%
March	-	-	-	-	6,119.74	2.6%
April	-	-	-	-	5,927.61	-3.1%
May	-	-	-	-	5,685.50	-4.1%
June	-	-	-	-	5,474.96	-3.7%
July	-	-	-	-	5,201.64	-5.0%
August	-	-	-	-	4,946.15	-4.9%
September	-	-	-	-	4,609.56	-6.8%
October	-	-	-	-	4,297.29	-6.8%
November	-	-	-	-	3,992.7	-7.1%
December	-	-	-	-	4,014.8	0.6%
Total	-	-	-	-	63,189.9	

MEH LCEGS Comparing Growth in Consecutive Months – Environmental Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	393.5	-	454.0	-4.0%	478.0	-3.3%
February	505.5	28.5%	469.6	3.4%	509.0	6.5%
March	438.2	-13.3%	483.4	2.9%	480.1	-5.7%
April	485.3	10.8%	519.2	7.4%	465.6	-3.0%
May	448.3	-7.6%	440.1	-15.2%	448.5	-3.7%
June	433.5	-3.3%	470.2	6.8%	425.2	-5.2%
July	428.0	-1.3%	489.8	4.2%	403.5	-5.1%
August	458.6	7.1%	514.3	5.0%	378.9	-6.1%
September	516.0	12.5%	512.1	-0.4%	353.2	-6.8%
October	511.1	-1.0%	467.9	-8.6%	329.5	-6.7%
November	452.0	-11.6%	455.4	-2.7%	306.1	-7.1%
December	472.9	4.6%	494.5	8.6%	276.9	-9.5%
Total	5,542.9		5,770.5		4,854.5	

UK LCEGS Comparing Growth in Consecutive Months – Environmental Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	-	-	-	-	2,878.99	-
February	-	-	-	-	2,539.59	-11.8%
March	-	-	-	-	2,662.70	4.8%
April	-	-	-	-	2,560.87	-3.8%
May	-	-	-	-	2,469.37	-3.6%
June	-	-	-	-	2,352.53	-4.7%
July	-	-	-	-	2,227.37	-5.3%
August	-	-	-	-	2,130.32	-4.4%
September	-	-	-	-	1,979.95	-7.1%
October	-	-	-	-	1,853.17	-6.4%
November	-	-	-	-	1,733.1	-6.5%
December	-	-	-	-	1,730.4	-0.2%
Total	-	-	-	-	27,118.4	

Although there have been fluctuations in sales on a month-by-month basis prior to Covid-19, this is normal fluctuation. There has been a consistent drop in growth each month between April to December in 2020 in all three Level 1 sub-sectors, indicating a continued contraction of the market. For Renewable Energy and Environmental, the contraction is increasing with higher negative growth rates August-December than were seen April-June.

The slight increase in sales in the UK is within the Low Carbon and Renewable Energy sub-sectors, although Environmental has seen a much slower negative growth in December.

MEH LCEGS Sales Comparing Consecutive Months – Level 1 Low Carbon, Level 2 Energy Management

	Energy Management					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	36.9	-	44.3	11.3%	46.4	3.1%
Feb	49.1	33.1%	40.5	-8.5%	52.2	12.5%
Mar	39.9	-18.8%	50.0	23.5%	40.8	-21.7%
Apr	43.7	9.7%	48.0	-4.0%	39.3	-3.7%
May	41.4	-5.4%	40.1	-16.5%	37.8	-3.8%
Jun	44.8	8.4%	47.9	19.4%	36.0	-4.8%
Jul	36.2	-19.2%	49.4	3.0%	33.7	-6.5%
Aug	41.9	15.8%	55.0	11.5%	31.6	-6.2%
Sep	46.7	11.3%	55.2	0.4%	29.4	-7.0%
Oct	48.2	3.3%	41.4	-25.0%	27.6	-6.2%
Nov	48.8	1.2%	42.4	2.4%	25.4	-8.0%
Dec	39.8	-18.4%	45.0	6.1%	23.1	-9.1%
Total	517.5		559.3		423.3	

UK LCEGS Sales Comparing Consecutive Months – Level 1 Low Carbon, Level 2 Energy Management

	Energy Management					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	-	-	-	-	306.7	-
Feb	-	-	-	-	316.8	3.3%
Mar	-	-	-	-	323.9	2.2%
Apr	-	-	-	-	314.2	-3.0%
May	-	-	-	-	299.5	-4.7%
Jun	-	-	-	-	291.0	-2.9%
Jul	-	-	-	-	277.3	-4.7%
Aug	-	-	-	-	262.7	-5.3%
Sep	-	-	-	-	245.2	-6.7%
Oct	-	-	-	-	229.3	-6.5%
Nov	-	-	-	-	212.4	-7.4%
Dec	-	-	-	-	211.8	-0.3%
Total	-	-	-	-	3,290.8	

MEH LCEGS Sales Comparing Consecutive Months – Level 1 Low Carbon, Level 2 Building Technologies

	Building Technologies					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	252.9	-	299.4	-1.5%	351.6	-2.6%
Feb	346.0	36.8%	313.3	4.6%	377.2	7.3%
Mar	298.0	-13.9%	312.8	-0.1%	336.7	-10.7%
Apr	321.1	7.7%	340.1	8.7%	327.0	-2.9%
May	314.0	-2.2%	311.8	-8.3%	310.9	-4.9%
Jun	284.5	-9.4%	334.3	7.2%	296.4	-4.6%
Jul	270.6	-4.9%	329.9	-1.3%	280.1	-5.5%
Aug	312.6	15.5%	387.2	17.4%	262.9	-6.1%
Sep	325.0	4.0%	386.8	-0.1%	243.1	-7.6%
Oct	317.7	-2.2%	334.1	-13.6%	227.8	-6.3%
Nov	320.6	0.9%	308.2	-7.8%	212.8	-6.6%
Dec	303.9	-5.2%	361.1	17.2%	191.8	-9.9%
Total	3,666.9		4,018.9		3,418.0	

UK LCEGS Sales Comparing Consecutive Months – Level 1 Low Carbon, Level 2 Building Technologies

	Building Technologies					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	-	-	-	-	2,295.1	-
Feb	-	-	-	-	1,927.0	-16.0%
Mar	-	-	-	-	1,976.8	2.6%
Apr	-	-	-	-	1,900.0	-3.9%
May	-	-	-	-	1,815.1	-4.5%
Jun	-	-	-	-	1,765.0	-2.8%
Jul	-	-	-	-	1,665.3	-5.6%
Aug	-	-	-	-	1,590.3	-4.5%
Sep	-	-	-	-	1,476.9	-7.1%
Oct	-	-	-	-	1,395.1	-5.5%
Nov	-	-	-	-	1,304.3	-6.5%
Dec	-	-	-	-	1,298.1	-0.5%
Total	-	-	-	-	20,409.0	

MEH LCEGS Sales Comparing Consecutive Months – Level 1 Low Carbon, Level 2 Alternative Fuels

	Alternative fuels					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	250.2	-	280.9	-9.7%	285.4	-14.2%
Feb	291.5	16.5%	261.0	-7.1%	329.1	15.3%
Mar	295.0	1.2%	338.8	29.8%	262.5	-20.3%
Apr	337.1	14.3%	334.2	-1.4%	258.7	-1.4%
May	280.4	-16.8%	314.4	-5.9%	244.7	-5.4%
Jun	264.9	-5.5%	310.0	-1.4%	237.6	-2.9%
Jul	285.3	7.7%	326.0	5.1%	230.3	-3.1%
Aug	312.3	9.4%	349.3	7.1%	227.4	-1.2%
Sep	299.9	-4.0%	344.2	-1.5%	214.2	-5.8%
Oct	321.8	7.3%	294.9	-14.3%	203.7	-4.9%
Nov	311.8	-3.1%	292.2	-0.9%	185.9	-8.7%
Dec	311.1	-0.2%	332.8	13.9%	167.5	-9.9%
Total	3,561.3		3,778.7		2,846.7	

UK LCEGS Sales Comparing Consecutive Months – Level 1 Low Carbon, Level 2 Alternative Fuels

	Alternative fuels					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	-	-	-	-	2,922.4	-
Feb	-	-	-	-	2,629.6	-10.0%
Mar	-	-	-	-	2,618.2	-0.4%
Apr	-	-	-	-	2,572.0	-1.8%
May	-	-	-	-	2,517.2	-2.1%
Jun	-	-	-	-	2,500.1	-0.7%
Jul	-	-	-	-	2,420.7	-3.2%
Aug	-	-	-	-	2,320.2	-4.1%
Sep	-	-	-	-	2,120.2	-8.6%
Oct	-	-	-	-	1,895.8	-10.6%
Nov	-	-	-	-	1,715.0	-9.5%
Dec	-	-	-	-	1,730.1	0.9%
Total	-	-	-	-	27,961.5	

Alternative Fuels showed positive growth in December.

MEH LCEGS Sales Comparing Consecutive Months – Level 1 Low Carbon, Level 2 Alternative Fuel Vehicles

	Alternative Fuel Vehicle					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	95.1	-	113.9	-1.7%	129.5	12.7%
Feb	128.6	35.2%	110.8	-2.7%	121.1	-6.5%
Mar	117.8	-8.4%	129.2	16.6%	111.3	-8.1%
Apr	122.6	4.1%	136.6	5.7%	107.6	-3.3%
May	115.1	-6.2%	102.2	-25.2%	105.7	-1.7%
Jun	100.5	-12.7%	125.8	23.2%	102.3	-3.2%
Jul	96.6	-3.8%	136.8	8.7%	98.9	-3.4%
Aug	105.6	9.2%	142.2	3.9%	92.1	-6.8%
Sep	119.8	13.5%	124.4	-12.5%	88.0	-4.5%
Oct	118.2	-1.3%	107.7	-13.4%	83.4	-5.1%
Nov	120.0	1.6%	120.7	12.1%	77.3	-8.7%
Dec	115.9	-3.4%	114.9	-4.8%	67.9	-9.9%
Total	1,355.7		1,465.1		1,185.0	

UK LCEGS Sales Comparing Consecutive Months – Level 1 Low Carbon, Level 2 Alternative Fuel Vehicles

	Alternative Fuel Vehicle					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	-	-	-	-	1,696.7	-
Feb	-	-	-	-	1,339.7	-21.0%
Mar	-	-	-	-	1,461.6	9.1%
Apr	-	-	-	-	1,451.2	-0.7%
May	-	-	-	-	1,383.2	-4.7%
Jun	-	-	-	-	1,325.5	-4.2%
Jul	-	-	-	-	1,266.2	-4.5%
Aug	-	-	-	-	1,194.8	-5.6%
Sep	-	-	-	-	1,082.0	-9.4%
Oct	-	-	-	-	1,014.9	-6.2%
Nov	-	-	-	-	947.3	-6.7%
Dec	-	-	-	-	947.2	0.0%
Total	-	-	-	-	15,110.3	

MEH LCEGS Sales Comparing Consecutive Months – Level 1 Renewable Energy, Level 2 Wind

	Wind					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	294.5	-	338.8	-1.9%	382.0	2.6%
Feb	328.4	11.5%	334.0	-1.4%	367.4	-3.8%
Mar	330.0	0.5%	371.7	11.3%	368.3	0.2%
Apr	353.4	7.1%	354.3	-4.7%	359.8	-2.3%
May	335.5	-5.0%	360.2	1.6%	349.1	-3.0%
Jun	345.4	3.0%	371.8	3.2%	336.9	-3.5%
Jul	343.1	-0.7%	402.1	8.2%	322.1	-4.4%
Aug	348.7	1.6%	373.0	-7.2%	307.5	-4.5%
Sep	403.9	15.8%	364.5	-2.3%	288.4	-6.2%
Oct	385.5	-4.6%	381.7	4.7%	272.8	-5.4%
Nov	368.9	-4.3%	331.0	-13.3%	254.0	-6.9%
Dec	345.2	-6.4%	372.3	12.5%	231.9	-8.7%
Total	4,182.6		4,355.5		3,840.3	

UK LCEGS Sales Comparing Consecutive Months – Level 1 Renewable Energy, Level 2 Wind

	Wind					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	-	-	-	-	3,345.8	-
Feb	-	-	-	-	2,638.5	-21.1%
Mar	-	-	-	-	2,732.9	3.6%
Apr	-	-	-	-	2,672.6	-2.2%
May	-	-	-	-	2,523.5	-5.6%
Jun	-	-	-	-	2,424.6	-3.9%
Jul	-	-	-	-	2,310.7	-4.7%
Aug	-	-	-	-	2,182.9	-5.5%
Sep	-	-	-	-	2,038.2	-6.6%
Oct	-	-	-	-	1,903.7	-6.6%
Nov	-	-	-	-	1,778.2	-6.6%
Dec	-	-	-	-	1,781.0	0.2%
Total	-	-	-	-	28,332.6	

MEH LCEGS Sales Comparing Consecutive Months – Level 1 Renewable Energy, Level 2 Geothermal

	Geothermal					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	77.8	-	95.7	-4.9%	90.9	-0.9%
Feb	94.6	21.6%	84.8	-11.4%	115.1	26.6%
Mar	88.0	-7.0%	97.1	14.5%	96.2	-16.4%
Apr	89.3	1.6%	107.6	10.9%	94.1	-2.1%
May	96.5	8.0%	91.1	-15.4%	90.0	-4.4%
Jun	75.9	-21.4%	98.9	8.6%	85.6	-4.8%
Jul	87.8	15.7%	105.2	6.4%	82.4	-3.8%
Aug	98.8	12.6%	94.6	-10.1%	78.3	-5.0%
Sep	97.3	-1.5%	108.2	14.4%	72.7	-7.2%
Oct	91.6	-5.9%	98.8	-8.6%	67.3	-7.3%
Nov	95.9	4.6%	90.3	-8.7%	60.7	-9.8%
Dec	100.6	5.0%	91.7	1.6%	54.5	-10.2%
Total	1,094.2		1,163.9		987.8	

UK LCEGS Sales Comparing Consecutive Months – Level 1 Renewable Energy, Level 2 Geothermal

	Geothermal					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	-	-	-	-	1,554.1	-
Feb	-	-	-	-	1,450.7	-6.7%
Mar	-	-	-	-	1,427.3	-1.6%
Apr	-	-	-	-	1,380.7	-3.3%
May	-	-	-	-	1,337.1	-3.2%
Jun	-	-	-	-	1,300.4	-2.7%
Jul	-	-	-	-	1,239.5	-4.7%
Aug	-	-	-	-	1,186.2	-4.3%
Sep	-	-	-	-	1,096.5	-7.6%
Oct	-	-	-	-	1,025.4	-6.5%
Nov	-	-	-	-	957.9	-6.6%
Dec	-	-	-	-	974.2	1.7%
Total	-	-	-	-	14,930.0	

Geothermal showed positive growth in December for the UK.

MEH LCEGS Sales Comparing Consecutive Months – Level 1 Renewable Energy, Level 2 Photovoltaic

	Photovoltaic					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	202.4	-	209.6	-8.0%	240.1	4.0%
Feb	217.1	7.3%	228.3	8.9%	260.1	8.3%
Mar	218.6	0.7%	250.5	9.7%	205.5	-21.0%
Apr	219.9	0.6%	229.1	-8.5%	197.4	-4.0%
May	206.5	-6.1%	202.0	-11.8%	189.2	-4.2%
Jun	200.9	-2.7%	224.1	10.9%	179.8	-5.0%
Jul	189.8	-5.5%	255.8	14.2%	171.1	-4.8%
Aug	200.5	5.6%	268.2	4.8%	161.5	-5.6%
Sep	233.9	16.6%	250.3	-6.7%	153.5	-5.0%
Oct	226.1	-3.3%	218.7	-12.6%	143.2	-6.7%
Nov	220.0	-2.7%	215.3	-1.6%	132.1	-7.8%
Dec	227.8	3.6%	230.9	7.2%	119.3	-9.7%
Total	2,563.5		2,782.9		2,152.7	

MEH LCEGS Sales Comparing Consecutive Months – Level 1 Renewable Energy, Level 2 Photovoltaic

	Photovoltaic					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	-	-	-	-	1,022.9	-
Feb	-	-	-	-	879.5	-14.0%
Mar	-	-	-	-	888.7	1.0%
Apr	-	-	-	-	860.2	-3.2%
May	-	-	-	-	837.9	-2.6%
Jun	-	-	-	-	803.4	-4.1%
Jul	-	-	-	-	746.7	-7.1%
Aug	-	-	-	-	710.5	-4.9%
Sep	-	-	-	-	662.8	-6.7%
Oct	-	-	-	-	611.3	-7.8%
Nov	-	-	-	-	560.8	-8.3%
Dec	-	-	-	-	561.3	0.1%
Total	-	-	-	-	9,146.0	

MEH LCEGS Sales Comparing Consecutive Months – Level 1 Renewable Energy, Level 2 Biomass

	Biomass					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	131.9	-	142.5	-11.7%	151.2	-8.6%
Feb	146.8	11.3%	154.4	8.3%	188.5	24.7%
Mar	141.4	-3.7%	167.7	8.7%	151.9	-19.4%
Apr	149.9	6.0%	155.3	-7.4%	147.0	-3.2%
May	150.9	0.7%	157.0	1.1%	141.7	-3.6%
Jun	152.7	1.2%	173.0	10.2%	136.6	-3.6%
Jul	141.6	-7.2%	147.6	-14.7%	128.4	-6.0%
Aug	155.2	9.6%	187.3	26.9%	121.9	-5.1%
Sep	180.2	16.1%	190.8	1.8%	114.7	-5.9%
Oct	169.0	-6.2%	150.9	-20.9%	105.8	-7.8%
Nov	140.0	-17.2%	164.7	9.1%	97.5	-7.8%
Dec	161.3	15.2%	165.4	0.4%	87.7	-10.1%
Total	1,820.9		1,956.5		1,572.8	

MEH LCEGS Sales Comparing Consecutive Months – Level 1 Renewable Energy, Level 2 Biomass

	Biomass					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	-	-	-	-	908.3	-
Feb	-	-	-	-	870.3	-4.2%
Mar	-	-	-	-	956.0	9.8%
Apr	-	-	-	-	902.2	-5.6%
May	-	-	-	-	878.4	-2.6%
Jun	-	-	-	-	842.4	-4.1%
Jul	-	-	-	-	806.6	-4.2%
Aug	-	-	-	-	773.9	-4.0%
Sep	-	-	-	-	726.2	-6.2%
Oct	-	-	-	-	674.3	-7.1%
Nov	-	-	-	-	619.3	-8.2%
Dec	-	-	-	-	621.9	0.4%
Total	-	-	-	-	9,579.8	

Biomass showed positive growth in the UK figures in December.

MEH LCEGS Sales Comparing Consecutive Months – Level 1 Environmental, Level 2 Water and Waste Water

	Water and Waste Water					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	124.4	-	147.8	-12.5%	162.6	0.1%
Feb	172.4	38.6%	169.6	14.7%	183.7	13.0%
Mar	146.1	-15.3%	159.4	-6.0%	168.3	-8.4%
Apr	155.6	6.5%	170.2	6.8%	163.9	-2.6%
May	154.4	-0.8%	155.1	-8.8%	155.8	-4.9%
Jun	157.1	1.7%	147.2	-5.1%	146.1	-6.2%
Jul	140.8	-10.3%	159.8	8.5%	138.9	-4.9%
Aug	148.2	5.2%	180.8	13.1%	130.9	-5.8%
Sep	190.5	28.6%	195.5	8.2%	122.2	-6.7%
Oct	181.3	-4.8%	166.3	-14.9%	114.0	-6.7%
Nov	146.8	-19.0%	153.6	-7.6%	106.3	-6.8%
Dec	168.9	15.1%	162.5	5.8%	96.2	-9.5%
Total	1,886.5		1,967.7		1,688.9	

UK LCEGS Sales Comparing Consecutive Months – Level 1 Environmental, Level 2 Water and Waste Water

	Water and Waste Water					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	-	-	-	-	870.1	-
Feb	-	-	-	-	893.3	2.7%
Mar	-	-	-	-	867.2	-2.9%
Apr	-	-	-	-	826.9	-4.6%
May	-	-	-	-	783.4	-5.3%
Jun	-	-	-	-	741.0	-5.4%
Jul	-	-	-	-	704.3	-5.0%
Aug	-	-	-	-	671.4	-4.7%
Sep	-	-	-	-	626.4	-6.7%
Oct	-	-	-	-	578.3	-7.7%
Nov	-	-	-	-	541.4	-6.4%
Dec	-	-	-	-	540.9	-0.1%
Total	-	-	-	-	8,644.6	

MEH LCEGS Sales Comparing Consecutive Months – Level 1 Environmental, Level 2 Waste Management

	Waste Management					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	118.6	-	136.9	-5.1%	145.1	-10.0%
Feb	154.0	29.9%	146.5	7.0%	145.6	0.3%
Mar	140.9	-8.5%	142.2	-2.9%	149.2	2.5%
Apr	159.4	13.1%	166.1	16.8%	144.5	-3.2%
May	136.4	-14.4%	121.2	-27.1%	141.0	-2.4%
Jun	122.5	-10.2%	148.1	22.2%	135.2	-4.1%
Jul	137.5	12.2%	153.7	3.8%	129.9	-3.9%
Aug	144.2	4.9%	150.1	-2.4%	121.2	-6.7%
Sep	148.0	2.6%	140.3	-6.5%	111.9	-7.7%
Oct	155.2	4.9%	145.7	3.8%	105.1	-6.1%
Nov	149.0	-4.0%	140.4	-3.6%	97.3	-7.4%
Dec	144.2	-3.2%	161.2	14.8%	88.5	-9.0%
Total	1,709.9		1,752.4		1,514.5	

UK LCEGS Sales Comparing Consecutive Months – Level 1 Environmental, Level 2 Waste Management

	Waste Management					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	-	-	-	-	656.8	-
Feb	-	-	-	-	512.8	-21.9%
Mar	-	-	-	-	605.1	18.0%
Apr	-	-	-	-	586.2	-3.1%
May	-	-	-	-	572.3	-2.4%
Jun	-	-	-	-	543.8	-5.0%
Jul	-	-	-	-	514.2	-5.4%
Aug	-	-	-	-	494.2	-3.9%
Sep	-	-	-	-	462.6	-6.4%
Oct	-	-	-	-	437.5	-5.4%
Nov	-	-	-	-	402.6	-8.0%
Dec	-	-	-	-	400.2	-0.6%
Total	-	-	-	-	6,188.3	

MEH LCEGS Sales Comparing Consecutive Months – Level 1 Environmental, Level 2 Recovery & Recycling

	Recovery & Recycling					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	109.2	-	120.1	7.4%	122.0	2.7%
Feb	129.3	18.4%	105.5	-12.1%	124.1	1.7%
Mar	104.9	-18.9%	128.6	21.9%	116.3	-6.3%
Apr	121.5	15.8%	131.0	1.9%	112.5	-3.3%
May	108.5	-10.6%	119.2	-9.0%	108.7	-3.4%
Jun	110.7	2.0%	122.9	3.1%	103.0	-5.2%
Jul	106.3	-4.0%	124.8	1.5%	96.1	-6.7%
Aug	120.2	13.1%	129.2	3.5%	90.3	-6.0%
Sep	122.2	1.6%	120.3	-6.9%	85.1	-5.7%
Oct	123.7	1.3%	106.7	-11.3%	79.0	-7.2%
Nov	109.4	-11.6%	111.1	4.1%	73.3	-7.2%
Dec	111.8	2.2%	118.8	7.0%	65.8	-10.2%
Total	1,377.7		1,438.3		1,176.3	

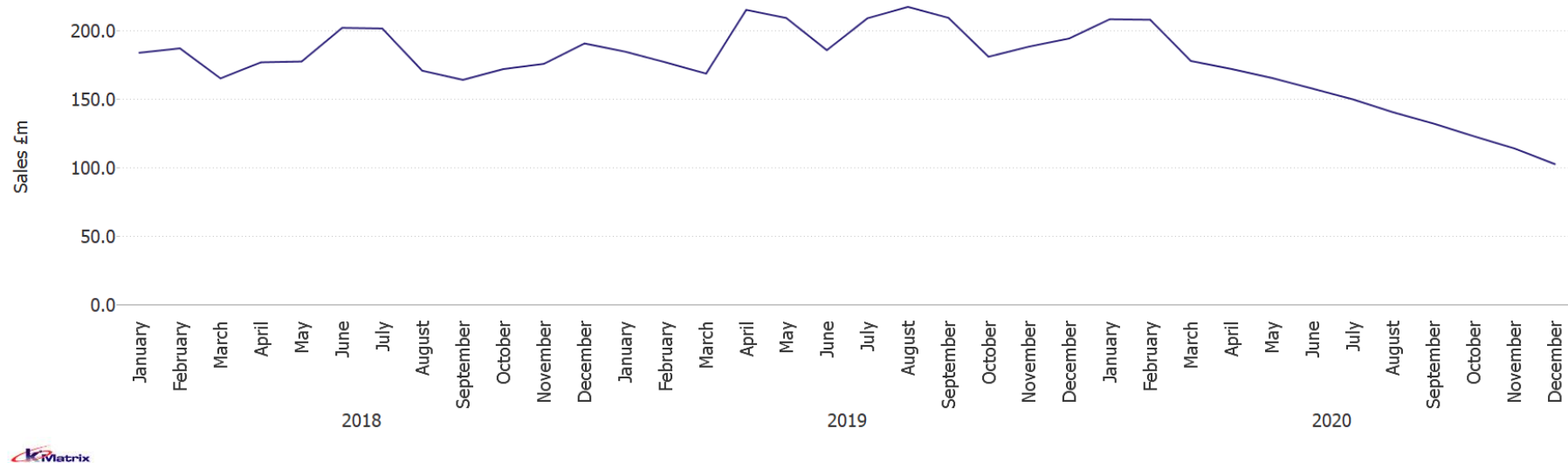
MEH LCEGS Sales Comparing Consecutive Months – Level 1 Environmental, Level 2 Recovery & Recycling

	Recovery & Recycling					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	-	-	-	-	938.9	-
Feb	-	-	-	-	780.3	-16.9%
Mar	-	-	-	-	825.2	5.8%
Apr	-	-	-	-	795.9	-3.6%
May	-	-	-	-	773.7	-2.8%
Jun	-	-	-	-	742.2	-4.1%
Jul	-	-	-	-	701.8	-5.4%
Aug	-	-	-	-	673.0	-4.1%
Sep	-	-	-	-	620.1	-7.9%
Oct	-	-	-	-	583.4	-5.9%
Nov	-	-	-	-	550.5	-5.6%
Dec	-	-	-	-	550.7	0.0%
Total	-	-	-	-	8,535.7	

Appendix A – Black Country LEP

Sector LCEGS Line Graphs – Sales, Companies and Employees

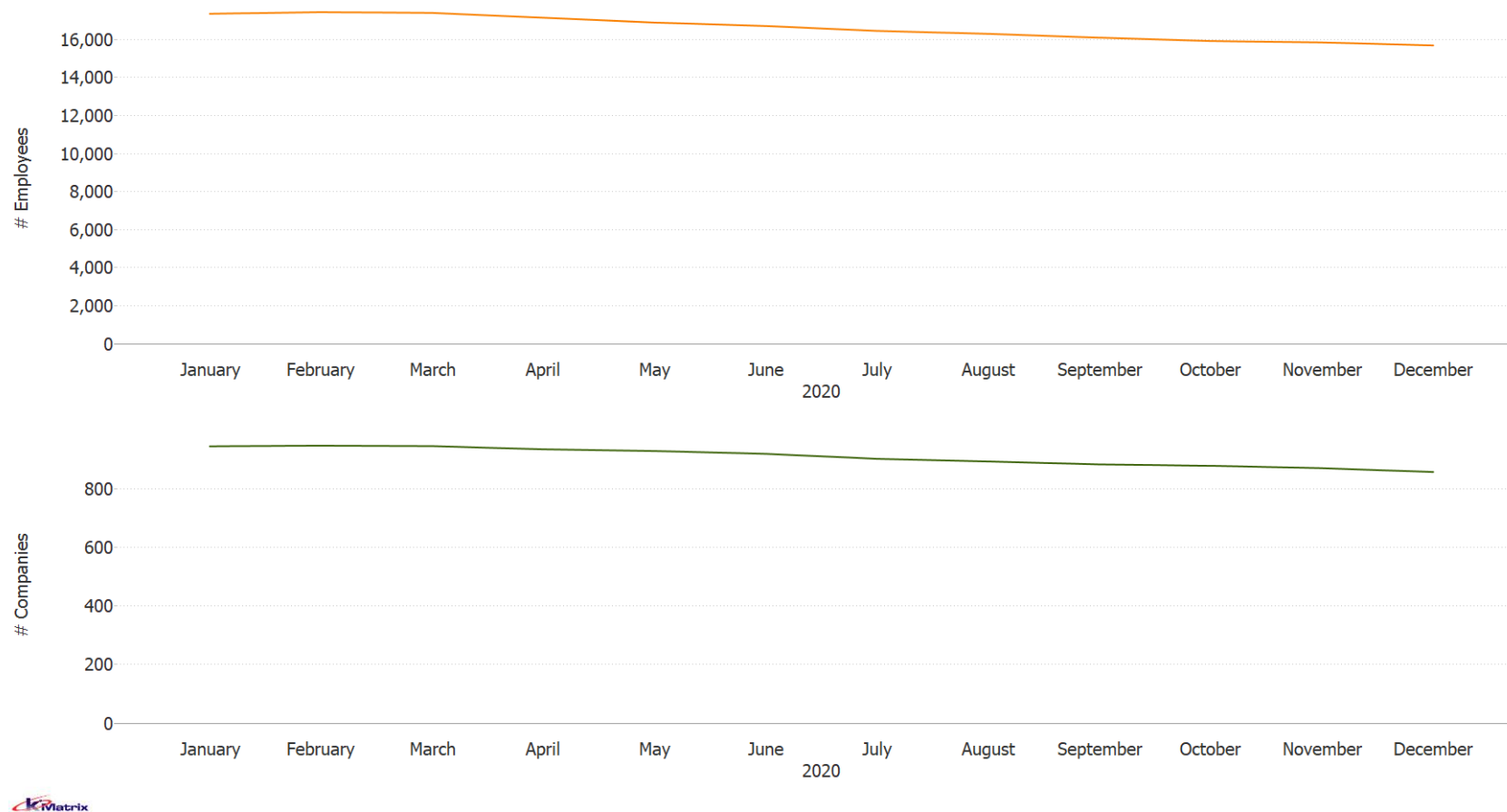
Black Country LEP LCEGS Sales by month from January 2018 through to December 2020



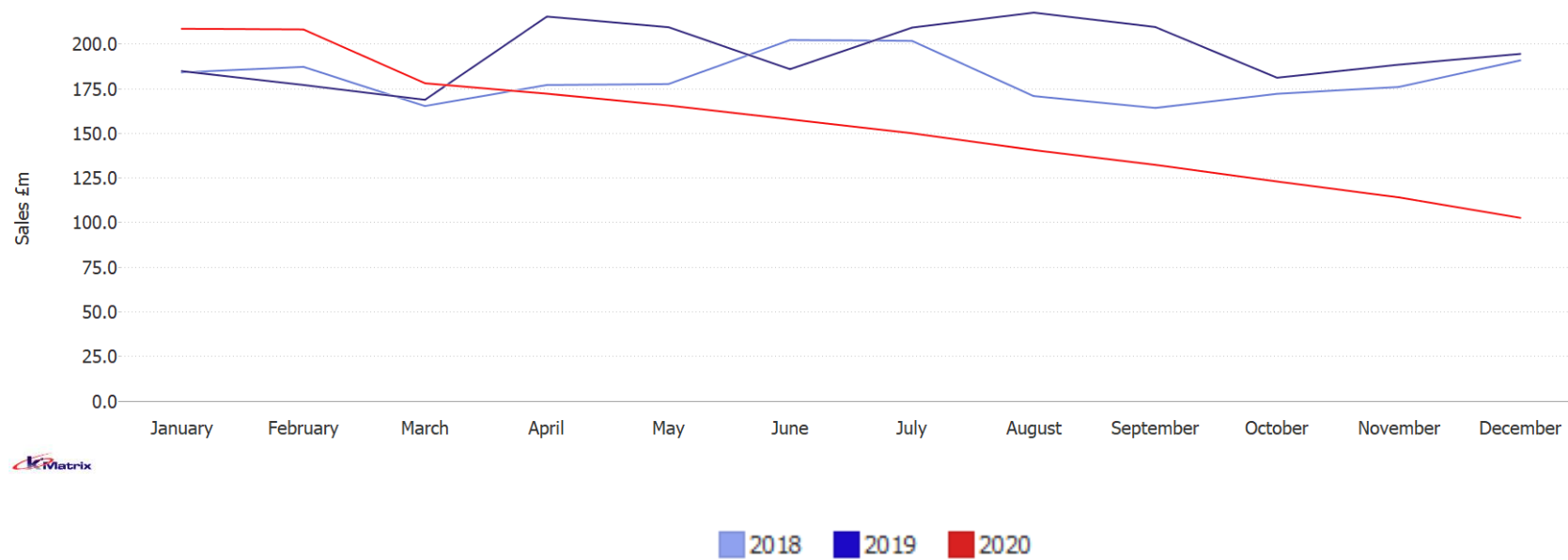
The variability of the sales value per month is normal and to be expected, what we can see is that a line of best fit would indicate overall growth in the sector between January 2018 and March 2020, followed by the contraction of the sector from March onwards.

Black Country LEP LCEGS Number of Employees and Companies by month from January 2020 through to December 2020

Monthly company and employee figures do fluctuate slightly month-to-month, in a normal year, however the continued decline from March onwards is not normal.

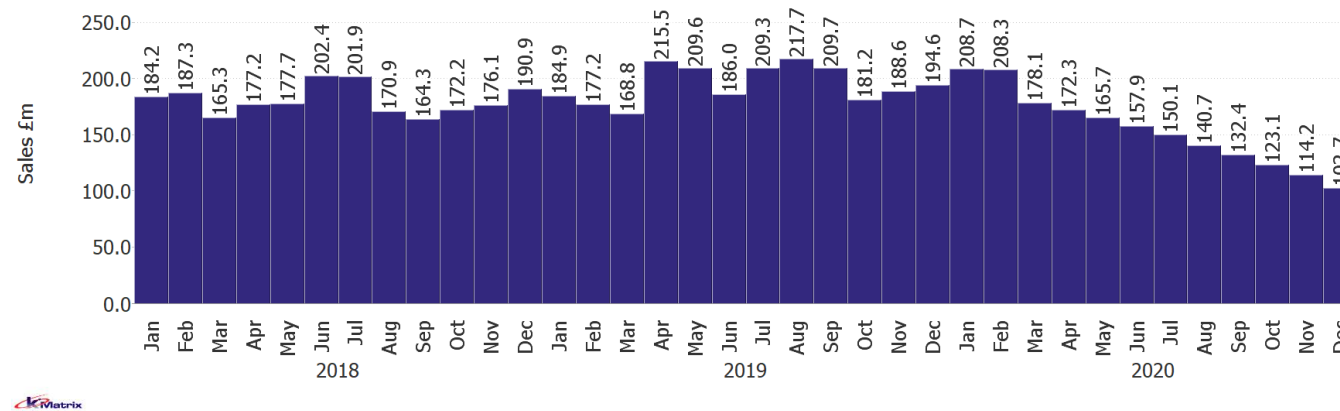


Black Country LEP LCEGS Sales by month, split by calendar year



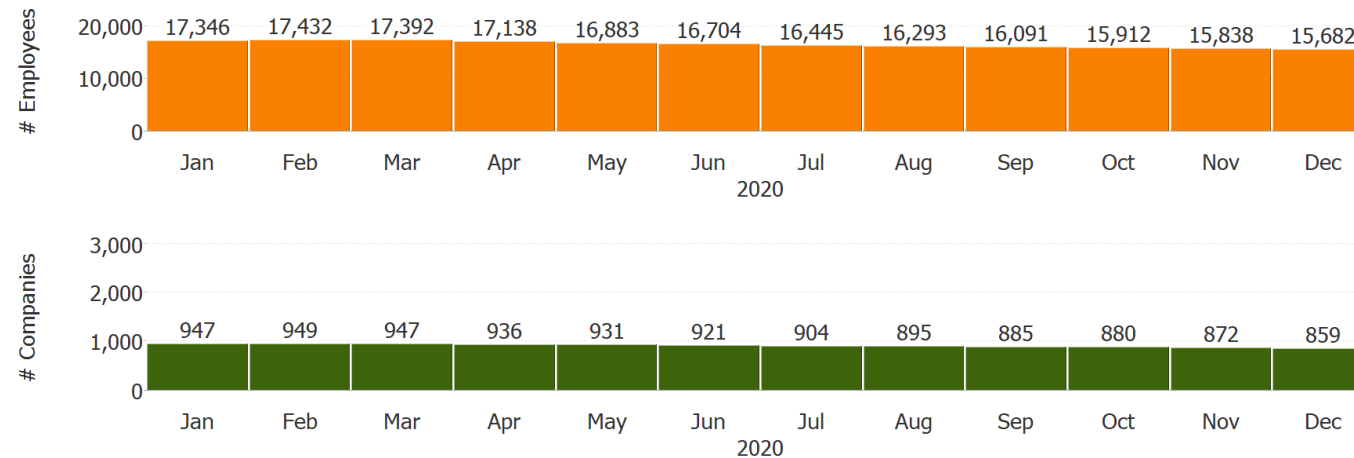
Sector LCEGS Histograms – Sales, Companies and Employees

Black Country LEP LCEGS Sales



KMatrix

Black Country LEP LCEGS Number of Employees and Companies



KMatrix

Sector, Level 1 & 2 LCEGS Data Tables – Sales

Sector

Black Country LEP LCEGS Comparing Growth in Consecutive Months – Sector Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	184.2	-	184.9	-3.1%	208.7	7.2%
February	187.3	1.7%	177.2	-4.2%	208.3	-0.2%
March	165.3	-11.7%	168.8	-4.7%	178.1	-14.5%
April	177.2	7.1%	215.5	27.6%	172.3	-3.3%
May	177.7	0.3%	209.6	-2.8%	165.7	-3.8%
June	202.4	13.9%	186.0	-11.2%	157.9	-4.7%
July	201.9	-0.2%	209.3	12.5%	150.1	-5.0%
August	170.9	-15.3%	217.7	4.0%	140.7	-6.3%
September	164.3	-3.9%	209.7	-3.7%	132.4	-5.9%
October	172.2	4.8%	181.2	-13.6%	123.1	-7.1%
November	176.1	2.2%	188.6	4.0%	114.2	-7.2%
December	190.9	8.5%	194.6	3.2%	102.7	-10.1%
Total	2,170.4		2,343.2		1,854.2	

Level 1

Black Country LEP LCEGS Comparing Growth in Consecutive Months – Low Carbon Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	69.9	-	68.0	-8.5%	83.0	9.2%
February	73.6	5.3%	69.3	2.0%	80.6	-2.8%
March	66.1	-10.1%	63.0	-9.1%	68.2	-15.5%
April	70.6	6.8%	84.1	33.5%	66.2	-2.9%
May	67.5	-4.4%	79.2	-5.8%	63.2	-4.6%
June	77.3	14.5%	72.3	-8.7%	59.8	-5.3%
July	79.4	2.7%	83.1	15.0%	57.5	-3.9%
August	64.5	-18.8%	86.4	4.0%	54.0	-6.2%
September	61.4	-4.8%	76.1	-11.9%	51.0	-5.6%
October	68.3	11.1%	69.6	-8.6%	47.1	-7.6%
November	68.6	0.5%	72.8	4.6%	43.6	-7.4%
December	74.3	8.3%	76.0	4.5%	39.0	-10.6%
Total	841.5		899.9		713.2	

Black Country LEP LCEGS Comparing Growth in Consecutive Months – Renewable Energy Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	72.5	-	73.7	1.2%	78.8	5.8%
February	71.4	-1.6%	66.1	-10.4%	78.9	0.2%
March	61.5	-13.8%	67.2	1.6%	69.7	-11.8%
April	66.3	7.8%	83.3	23.9%	67.0	-3.7%
May	69.8	5.3%	83.7	0.6%	64.9	-3.1%
June	78.3	12.1%	71.1	-15.1%	62.1	-4.4%
July	78.7	0.5%	80.0	12.6%	58.3	-6.1%
August	66.5	-15.4%	80.5	0.6%	54.3	-6.8%
September	64.5	-3.1%	83.5	3.7%	51.1	-5.9%
October	65.7	1.9%	67.6	-19.0%	47.8	-6.6%
November	67.8	3.3%	71.8	6.2%	44.5	-6.9%
December	72.8	7.4%	74.5	3.7%	40.3	-9.4%
Total	835.8		903.2		717.7	

Black Country LEP LCEGS Comparing Growth in Consecutive Months – Environmental Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	41.8	-	43.2	-1.6%	46.9	6.3%
February	42.4	1.4%	41.7	-3.5%	48.7	3.9%
March	37.7	-11.2%	38.7	-7.3%	40.3	-17.2%
April	40.2	6.8%	48.1	24.5%	39.0	-3.2%
May	40.3	0.3%	46.6	-3.2%	37.6	-3.7%
June	46.7	15.8%	42.7	-8.5%	36.0	-4.2%
July	43.8	-6.3%	46.2	8.3%	34.3	-4.8%
August	39.9	-8.9%	50.8	10.0%	32.4	-5.4%
September	38.4	-3.8%	50.0	-1.6%	30.3	-6.3%
October	38.3	-0.3%	44.0	-12.0%	28.2	-7.0%
November	39.7	3.6%	44.0	-0.1%	26.1	-7.4%
December	43.9	10.6%	44.1	0.3%	23.4	-10.3%
Total	493.1		540.1		423.2	

Although there have been fluctuations in sales on a month-by-month basis prior to Covid-19, this is normal fluctuation. There has been a consistent drop in growth each month between April to December in 2020 in all three Level 1 sub-sectors, indicating a continued contraction of the market. For Renewable Energy and Environmental, the contraction is increasing with higher negative growth rates August-December than were seen April-June.

Level 2

Black Country LEP LCEGS Sales Comparing Consecutive Months – Level 1 Low Carbon, Level 2 Energy Management and Building Technologies

	Energy Management						Building Technologies					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	3.8	-	3.6	-5.3%	3.9	8.3%	30.0	-	27.8	-8.9%	32.3	11.0%
Feb	3.7	-4.6%	3.9	7.1%	3.9	-0.5%	26.0	-13.4%	28.8	3.6%	32.0	-1.1%
Mar	3.6	-2.2%	3.3	-15.1%	3.8	-2.2%	25.4	-2.1%	23.9	-17.1%	28.1	-12.1%
Apr	3.3	-8.2%	4.2	27.4%	3.6	-3.7%	28.0	10.4%	30.6	28.3%	26.9	-4.2%
May	3.5	5.9%	4.4	3.5%	3.5	-3.3%	27.0	-3.8%	33.6	9.6%	25.6	-4.8%
Jun	3.6	3.6%	4.0	-8.1%	3.4	-4.5%	30.6	13.6%	30.0	-10.6%	24.0	-6.4%
Jul	3.7	3.3%	4.5	12.7%	3.2	-4.9%	31.2	1.9%	32.3	7.6%	23.1	-3.8%
Aug	3.6	-5.0%	4.0	-12.3%	3.0	-6.3%	24.5	-21.5%	34.2	5.8%	21.9	-5.3%
Sep	3.4	-5.2%	4.2	5.6%	2.8	-6.7%	23.2	-5.3%	29.0	-15.2%	20.6	-5.7%
Oct	3.5	4.4%	3.4	-19.0%	2.6	-6.8%	27.8	19.7%	25.9	-10.7%	19.2	-6.7%
Nov	3.8	7.4%	3.7	8.8%	2.4	-7.7%	28.4	2.1%	27.5	6.3%	17.7	-7.8%
Dec	3.8	-0.4%	3.6	-1.1%	2.2	-8.3%	30.5	7.5%	29.1	6.0%	16.3	-7.9%
Total	43.2		46.8		38.3		332.6		352.6		287.7	

Black Country LEP LCEGS Sales Comparing Consecutive Months – Level 1 Low Carbon, Level 2 Alternative Fuels and Alternative Fuel Vehicles

	Alternative fuels						Alternative Fuel Vehicle					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	23.9	-	24.1	-11.4%	30.7	1.0%	9.8	-	10.2	-2.9%	13.5	27.4%
Feb	29.7	24.2%	23.1	-3.8%	29.6	-3.6%	11.9	21.3%	11.4	12.2%	12.7	-5.8%
Mar	25.4	-14.6%	23.4	1.1%	24.6	-16.7%	9.8	-18.0%	10.3	-9.6%	9.6	-24.2%
Apr	26.5	4.6%	33.8	44.5%	24.2	-1.8%	10.6	8.6%	12.8	23.9%	9.5	-1.2%
May	23.7	-10.7%	26.9	-20.5%	23.3	-3.7%	11.3	6.6%	11.8	-7.5%	8.8	-6.9%
Jun	28.5	20.3%	25.3	-6.0%	22.2	-4.7%	12.2	8.2%	10.7	-9.7%	8.5	-4.1%
Jul	30.4	6.6%	32.0	26.6%	21.6	-2.7%	11.8	-3.4%	11.8	10.2%	7.9	-6.4%
Aug	24.8	-18.5%	33.5	4.8%	19.8	-8.2%	9.7	-18.3%	12.0	1.4%	7.7	-3.3%
Sep	23.4	-5.5%	27.6	-17.8%	18.8	-5.1%	9.5	-1.3%	12.9	7.7%	7.2	-5.8%
Oct	26.0	11.0%	25.8	-6.6%	17.0	-9.5%	8.9	-7.0%	12.3	-4.5%	6.8	-5.7%
Nov	24.1	-7.0%	27.2	5.7%	15.8	-7.1%	10.0	13.0%	12.0	-2.4%	6.3	-7.4%
Dec	27.2	12.8%	30.4	11.7%	13.7	-13.3%	10.5	4.3%	10.6	-11.9%	5.7	-9.5%
Total	313.6		333.0		261.3		126.1		138.8		104.2	

Black Country LEP LCEGS Sales Comparing Consecutive Months – Level 1 Renewable Energy, Level 2 Wind and Geothermal

	Wind						Geothermal					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	29.9	-	32.9	-1.2%	36.6	16.2%	8.2	-	7.4	-14.0%	8.6	13.2%
Feb	28.7	-4.0%	26.7	-19.0%	33.5	-8.4%	8.8	7.9%	7.9	7.0%	8.5	-1.5%
Mar	24.6	-14.2%	28.2	5.8%	28.7	-14.4%	7.8	-11.2%	8.3	5.1%	8.3	-2.1%
Apr	27.9	13.2%	34.6	22.6%	27.6	-3.9%	7.8	-0.9%	9.7	16.9%	8.0	-2.8%
May	30.1	7.9%	34.3	-0.9%	27.0	-2.0%	7.9	2.0%	9.8	1.2%	7.7	-4.5%
Jun	33.9	12.8%	31.4	-8.4%	25.8	-4.5%	9.3	17.5%	7.9	-19.2%	7.4	-4.0%
Jul	35.4	4.3%	35.3	12.6%	24.4	-5.7%	8.1	-13.2%	9.5	19.4%	6.8	-7.5%
Aug	29.7	-16.0%	32.9	-7.0%	22.8	-6.4%	6.9	-15.0%	9.6	1.4%	6.5	-5.1%
Sep	26.1	-12.2%	37.5	14.1%	21.7	-4.9%	7.0	2.5%	10.0	4.6%	6.1	-6.4%
Oct	27.4	5.2%	28.2	-24.7%	20.3	-6.3%	8.0	13.8%	8.5	-15.3%	5.7	-6.5%
Nov	30.4	10.9%	29.2	3.4%	18.9	-6.9%	7.2	-10.3%	7.9	-7.2%	5.3	-7.0%
Dec	33.3	9.5%	31.5	7.7%	17.0	-10.1%	8.6	19.7%	7.6	-3.8%	4.9	-7.5%
Total	357.3		382.7		304.3		95.6		103.9		83.8	

Black Country LEP LCEGS Sales Comparing Consecutive Months – Level 1 Renewable Energy, Level 2 Photovoltaic and Biomass

	Photovoltaic						Biomass					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	18.8	-	17.7	7.9%	18.8	-2.6%	14.3	-	14.4	10.8%	13.4	-9.5%
Feb	19.0	1.2%	17.6	-0.7%	19.3	2.5%	13.5	-5.5%	12.5	-13.0%	16.2	20.7%
Mar	15.1	-20.5%	16.1	-8.4%	17.7	-8.0%	12.8	-5.0%	13.3	6.2%	13.7	-15.3%
Apr	16.7	10.3%	20.6	28.1%	17.2	-3.1%	12.7	-1.0%	16.7	25.8%	13.1	-4.7%
May	16.7	0.1%	21.9	6.0%	16.6	-3.3%	13.8	9.3%	16.3	-2.9%	12.5	-4.3%
Jun	20.6	23.8%	16.8	-23.1%	16.1	-3.0%	13.0	-6.3%	13.6	-16.1%	11.7	-6.2%
Jul	19.9	-3.5%	19.2	14.2%	14.9	-7.3%	13.8	6.7%	14.6	7.1%	11.2	-4.1%
Aug	17.5	-12.3%	21.6	12.4%	13.9	-6.7%	11.3	-18.2%	14.9	2.1%	10.2	-9.0%
Sep	18.1	3.4%	19.0	-11.9%	13.0	-6.2%	11.9	5.5%	15.4	3.3%	9.4	-7.6%
Oct	17.0	-5.8%	17.1	-9.9%	12.2	-6.9%	12.0	0.6%	12.4	-19.5%	8.8	-6.7%
Nov	17.7	3.8%	19.5	13.7%	11.3	-7.4%	11.2	-6.7%	13.9	11.9%	8.2	-6.8%
Dec	16.4	-7.2%	19.3	-1.2%	10.2	-9.7%	13.0	16.4%	14.8	7.0%	7.5	-8.5%
Total	213.4		226.6		181.2		153.4		172.9		135.9	

Black Country LEP LCEGS Sales Comparing Consecutive Months – Level 1 Environmental, Level 2 Water and Waste Water and Waste Management

	Water and Waste Water						Waste Management					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	13.5	-	15.4	2.7%	16.8	11.3%	13.6	-	12.3	-6.1	14.3	9.2%
Feb	13.9	2.4%	14.9	-3.5%	16.9	0.2%	12.8	-6.0%	12.1	-1.5%	14.7	2.4%
Mar	13.1	-5.3%	13.3	-11.0%	14.0	-16.6%	12.0	-6.2%	11.1	-8.1%	12.7	-13.5%
Apr	13.5	2.6%	17.2	29.9%	13.6	-3.3%	11.3	-6.0%	14.3	29.1%	12.2	-3.7%
May	14.5	7.9%	15.6	-9.3%	13.1	-3.5%	12.2	7.7%	13.7	-4.1%	11.8	-3.7%
Jun	17.4	19.5%	15.2	-2.8%	12.5	-4.8%	13.0	7.2%	12.9	-5.7%	11.4	-3.4%
Jul	14.7	-15.6%	16.7	9.7%	11.9	-4.7%	12.6	-3.1%	13.5	4.1%	10.9	-4.1%
Aug	12.9	-11.8%	17.0	1.8%	11.3	-5.0%	12.2	-3.3%	16.0	18.7%	10.3	-5.4%
Sep	14.3	10.6%	16.6	-2.0%	10.6	-6.3%	11.1	-9.3%	15.3	-4.3%	9.6	-6.6%
Oct	13.2	-7.8%	15.0	-9.7%	9.8	-7.1%	11.5	3.7%	13.6	-11.0%	8.9	-7.0%
Nov	13.9	5.2%	14.9	-0.8%	9.0	-8.2%	11.3	-1.6%	12.3	-9.7%	8.3	-6.7%
Dec	15.0	8.0%	15.1	1.2%	8.1	-10.0%	13.1	15.8%	13.1	6.0%	7.4	-10.8%
Total	169.8		186.8		147.6		146.7		160.2		132.5	

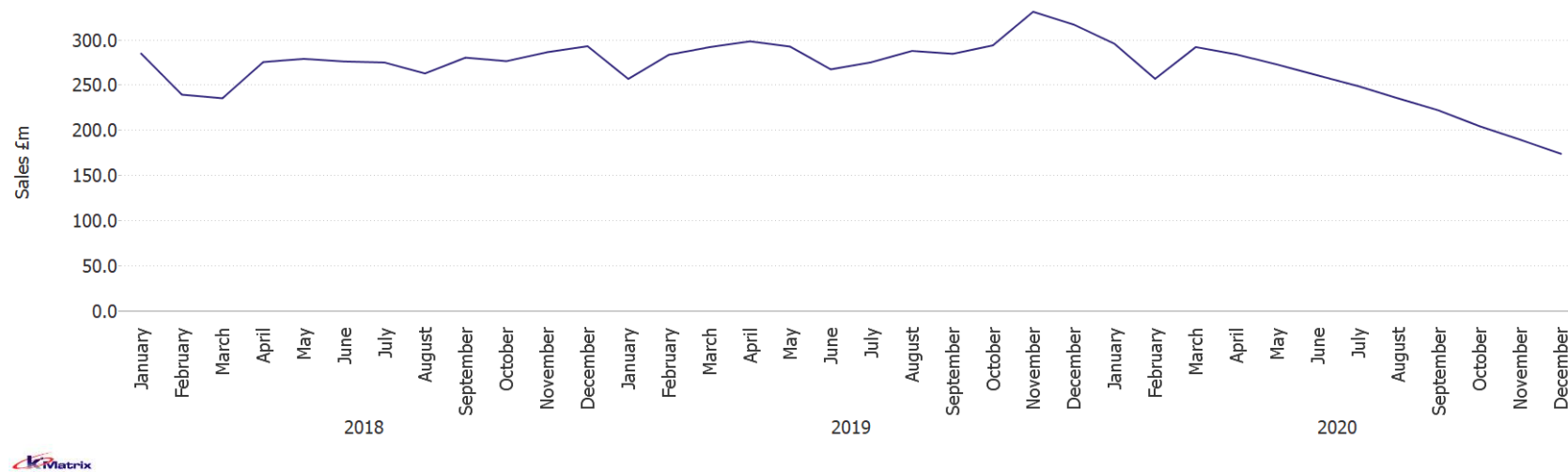
Black Country LEP LCEGS Sales Comparing Consecutive Months – Level 1 Environmental, Level 2 Recovery & Recycling

	Recovery & Recycling					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	10.4	-	11.1	-1.8%	11.0	-6.0%
Feb	11.3	8.2%	10.3	-7.2%	12.3	11.7%
Mar	8.7	-22.9%	10.1	-2.1%	9.6	-21.8%
Apr	11.2	28.7%	11.3	11.1%	9.4	-2.1%
May	9.6	-14.7%	12.4	10.6%	9.0	-4.2%
Jun	11.6	21.0%	10.2	-17.6%	8.6	-4.2%
Jul	11.8	1.9%	11.0	7.4%	8.1	-5.8%
Aug	10.7	-9.0%	12.7	15.8%	7.6	-6.0%
Sep	9.1	-14.9%	12.9	1.0%	7.2	-6.2%
Oct	9.7	6.7%	11.1	-13.6%	6.7	-6.9%
Nov	10.7	9.9%	12.1	8.9%	6.3	-6.0%
Dec	11.3	5.5%	11.7	-3.3%	5.6	-11.1%
Total	126.2		137.2		101.4	

Appendix B – Coventry and Warwickshire LEP

Sector LCEGS Line Graphs – Sales, Companies and Employees

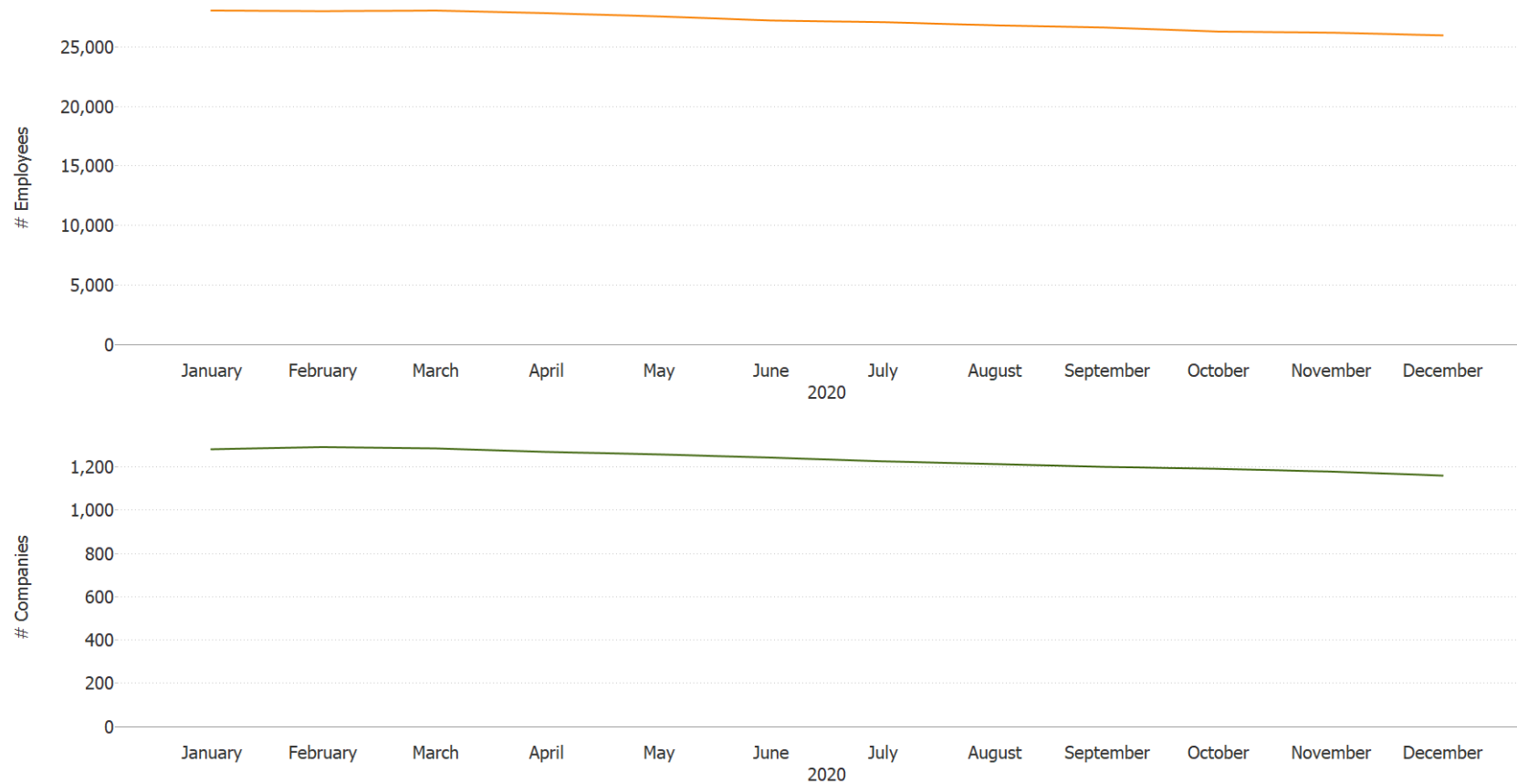
Coventry and Warwickshire LEP LCEGS Sales by month from January 2018 through to December 2020



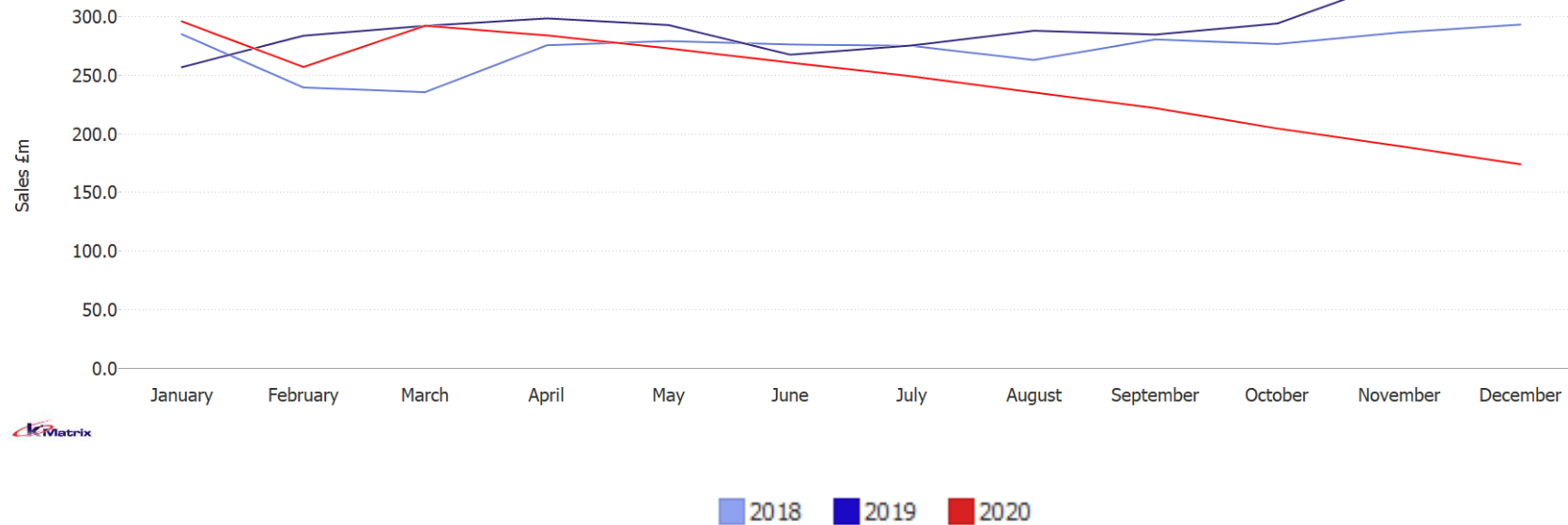
The variability of the sales value per month is normal and to be expected, what we can see is that a line of best fit would indicate overall growth in the sector between January 2018 and March 2020, followed by the contraction of the sector from March onwards.

Coventry and Warwickshire LEP LCEGS Number of Employees and Companies by month from January 2020 through to December 2020

Monthly company and employee figures do fluctuate slightly month-to-month, in a normal year, however the continued decline from March onwards is not normal.

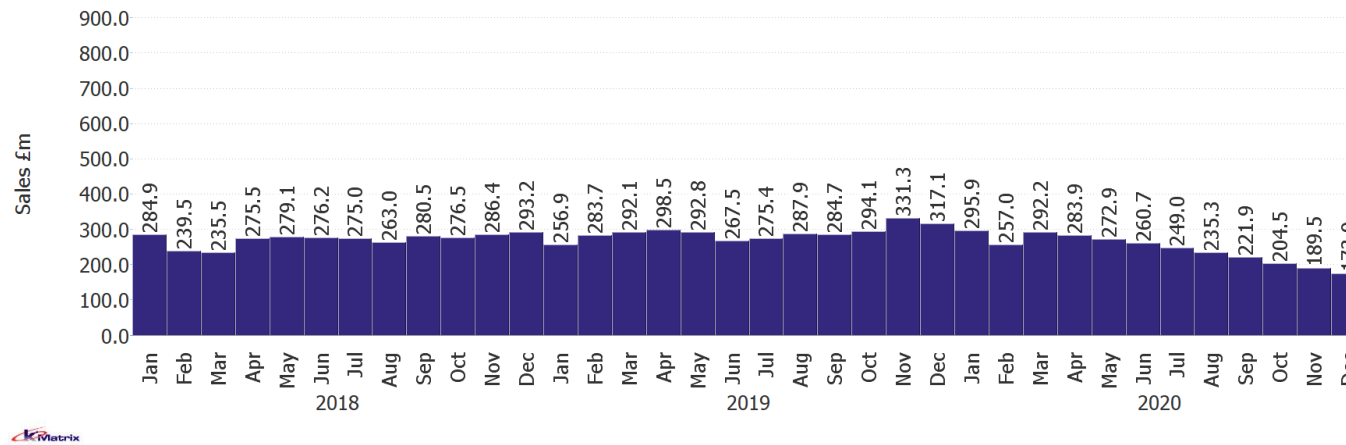


Coventry and Warwickshire LEP LCEGS Sales by month, split by calendar year



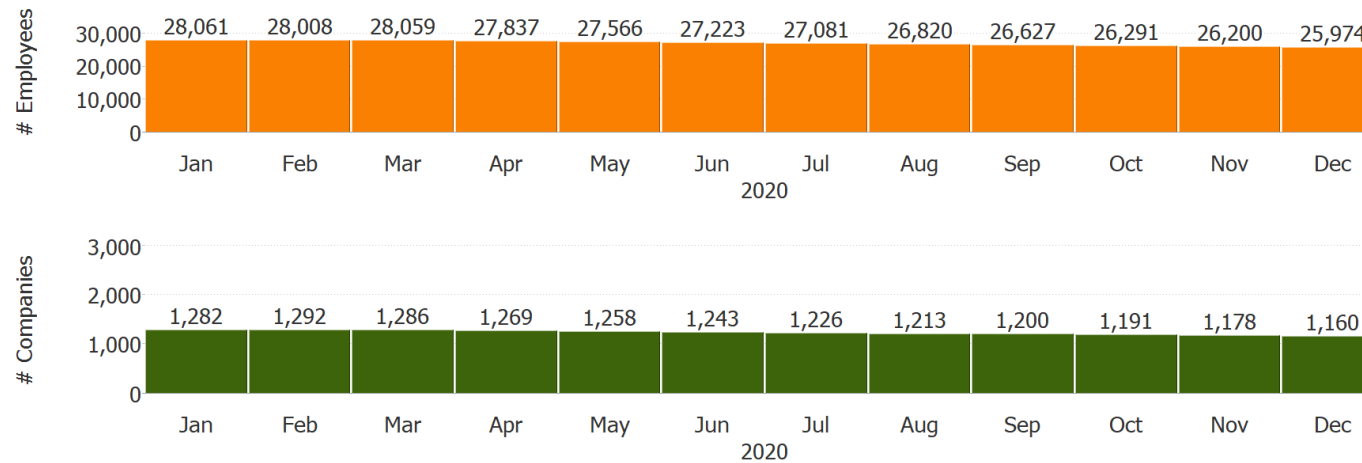
Sector LCEGS Histograms – Sales, Companies and Employees

Coventry and Warwickshire LEP LCEGS Sales



KMatrix

Coventry and Warwickshire LEP LCEGS Number of Employees and Companies



KMatrix

Sector, Level 1 & 2 LCEGS Data Tables – Sales

Sector

Coventry and Warwickshire LEP LCEGS Comparing Growth in Consecutive Months – Sector Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	284.9	-	256.9	-12.4%	295.9	-6.7%
February	239.5	-16.0%	283.7	10.5%	257.0	-13.1%
March	235.5	-1.7%	292.1	3.0%	292.2	13.7%
April	275.5	17.0%	298.5	2.2%	283.9	-2.8%
May	279.1	1.3%	292.8	-1.9%	272.9	-3.9%
June	276.2	-1.0%	267.5	-8.6%	260.7	-4.4%
July	275.0	-0.4%	275.4	2.9%	249.0	-4.5%
August	263.0	-4.4%	287.9	4.6%	235.3	-5.5%
September	280.5	6.7%	284.7	-1.1%	221.9	-5.7%
October	276.5	-1.4%	294.1	3.3%	204.5	-7.9%
November	286.4	3.6%	331.3	12.6%	189.5	-7.3%
December	293.2	2.3%	317.1	-4.3%	173.9	-8.2%
Total	3,265.3		3,481.9		2,9363.7	

Level 1

Coventry and Warwickshire LEP LCEGS Comparing Growth in Consecutive Months – Low Carbon Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	107.2	-	96.9	-15.5%	111.6	-8.1%
February	91.2	-14.9%	110.5	14.0%	96.8	-13.2%
March	90.5	-0.8%	114.0	3.1%	108.8	12.4%
April	102.3	13.0%	117.6	3.2%	106.1	-2.5%
May	103.9	1.6%	111.3	-5.4%	102.0	-3.9%
June	104.7	0.8%	102.2	-8.2%	96.4	-5.4%
July	104.7	0.0%	104.3	2.1%	92.4	-4.2%
August	104.9	0.1%	106.6	2.2%	87.7	-5.1%
September	110.7	5.5%	104.3	-2.1%	83.0	-5.4%
October	107.8	-2.6%	113.6	8.9%	76.1	-8.3%
November	106.2	-1.5%	128.7	13.3%	70.8	-7.0%
December	114.7	8.0%	121.5	-5.6%	64.9	-8.3%
Total	1,248.7		1,331.4		1,096.6	

Coventry and Warwickshire LEP LCEGS Comparing Growth in Consecutive Months – Renewable Energy Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	112.6	-	100.1	-10.6%	118.4	-5.5%
February	92.7	-17.7%	109.8	9.7%	100.7	-15.0%
March	91.5	-1.4%	113.2	3.1%	118.4	17.6%
April	111.0	21.3%	112.8	-0.4%	115.0	-2.8%
May	112.4	1.3%	114.6	1.6%	109.8	-4.5%
June	108.2	-3.7%	102.1	-10.9%	105.9	-3.6%
July	108.1	-0.1%	107.7	5.5%	100.4	-5.1%
August	102.0	-5.6%	114.2	6.0%	94.9	-5.5%
September	107.5	5.4%	114.7	0.5%	89.4	-5.8%
October	107.6	0.1%	114.9	0.1%	82.4	-7.8%
November	116.2	7.9%	130.7	13.8%	76.3	-7.4%
December	112.0	-3.6%	125.3	-4.1%	70.3	-7.9%
Total	1,281.9		1,360.2		1,181.9	

Coventry and Warwickshire LEP LCEGS Comparing Growth in Consecutive Months – Environmental Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	65.1	-	59.9	-9.9%	65.9	-6.4%
February	55.5	-14.8%	63.4	5.9%	59.5	-9.7%
March	53.5	-3.6%	64.9	2.5%	65.0	9.2%
April	62.3	16.6%	68.1	4.9%	62.8	-3.3%
May	62.8	0.8%	66.9	-1.8%	61.1	-2.7%
June	63.2	0.7%	63.2	-5.5%	58.4	-4.3%
July	62.1	-1.7%	63.3	0.2%	56.2	-3.9%
August	56.0	-9.8%	67.2	6.0%	52.7	-6.1%
September	62.3	11.2%	65.7	-2.2%	49.5	-6.1%
October	61.1	-2.0%	65.6	-0.1%	46.0	-7.1%
November	64.1	4.9%	71.9	9.5%	42.5	-7.6%
December	66.5	3.7%	70.4	-2.1%	38.7	-8.9%
Total	734.6		790.3		658.3	

Although there have been fluctuations in sales on a month-by-month basis prior to Covid-19, this is normal fluctuation. There has been a consistent drop in growth each month between April to December in 2020 in all three Level 1 sub-sectors, indicating a continued contraction of the market. For Renewable Energy and Environmental, the contraction is increasing with higher negative growth rates August-December than were seen April-June.

Level 2

Coventry and Warwickshire LEP LCEGS Sales Comparing Consecutive Months – Level 1 Low Carbon, Level 2 Energy Management and Building Technologies

	Energy Management						Building Technologies					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	5.7	-	5.3	-18.5%	5.6	-16.4%	43.9	-	38.2	-18.4%	44.7	-11.8%
Feb	4.9	-14.3%	5.7	7.0%	5.7	1.9%	33.7	-23.3%	47.2	23.5%	39.1	-12.5%
Mar	5.0	3.3%	6.0	6.5%	5.7	0.9%	39.5	17.4%	45.4	-3.9%	39.3	0.4%
Apr	6.4	26.3%	6.7	11.2%	5.6	-2.5%	38.9	-1.6%	48.8	7.6%	38.5	-1.9%
May	6.1	-4.8%	5.7	-15.4%	5.4	-3.7%	40.8	4.8%	45.7	-6.4%	37.3	-3.1%
Jun	5.1	-16.6%	6.4	12.4%	5.1	-4.3%	39.6	-3.0%	38.0	-16.7%	35.5	-4.9%
Jul	6.2	22.1%	5.9	-6.7%	4.9	-4.3%	39.9	0.9%	42.7	12.4%	34.4	-3.2%
Aug	5.9	-3.9%	5.7	-4.0%	4.6	-6.0%	43.4	8.7%	41.3	-3.3%	32.3	-6.0%
Sep	6.5	8.9%	6.2	9.0%	4.4	-5.2%	41.6	-4.3%	42.0	1.6%	30.8	-4.6%
Oct	5.5	-15.1%	6.6	6.2%	4.0	-7.6%	43.5	4.6%	39.3	-6.3%	28.6	-7.3%
Nov	6.1	10.4%	6.2	-5.4%	3.8	-5.0%	41.7	-4.0%	52.9	34.4%	26.5	-7.3%
Dec	6.5	7.2%	6.7	7.6%	3.5	-7.9%	46.8	12.3%	50.7	-4.1%	24.2	-8.7%
Total	69.7		73.1		58.3		493.4		532.4		411.2	

Coventry and Warwickshire LEP LCEGS Sales Comparing Consecutive Months – Level 1 Low Carbon, Level 2 Alternative Fuels and Alternative Fuel Vehicles

	Alternative fuels						Alternative Fuel Vehicle					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	37.0	-	34.6	-16.2%	41.4	-5.0%	16.8	-	15.4	-6.7%	15.9	-1.9%
Feb	35.1	-5.1%	39.1	13.1%	33.9	-18.1%	14.5	-13.7%	14.8	-3.3%	14.7	-7.4%
Mar	30.6	-12.7%	40.9	4.7%	44.6	31.7%	12.1	-16.4%	17.6	18.8%	15.4	4.6%
Apr	37.0	20.6%	43.0	5.0%	43.7	-2.2%	16.6	37.5%	15.1	-14.5%	14.7	-4.7%
May	38.0	2.7%	39.2	-8.8%	41.2	-5.6%	15.3	-8.2%	16.7	10.6%	14.6	-0.9%
Jun	41.0	8.0%	39.4	0.4%	38.5	-6.7%	15.4	1.0%	14.8	-11.4%	14.0	-3.8%
Jul	38.5	-6.1%	36.1	-8.3%	36.3	-5.6%	16.4	6.2%	15.9	7.7%	13.6	-2.8%
Aug	36.6	-5.0%	40.9	13.4%	34.8	-4.2%	15.5	-5.5%	14.6	-8.2%	13.0	-4.8%
Sep	42.1	14.9%	37.9	-7.3%	32.7	-5.9%	17.1	10.5%	14.6	-0.1%	12.2	-5.9%
Oct	39.0	-7.2%	45.2	19.3%	29.7	-9.1%	16.5	-3.5%	18.5	26.5%	11.1	-9.4%
Nov	39.1	0.3%	46.9	3.6%	27.4	-7.7%	15.4	-6.7%	18.3	-1.1%	10.6	-4.5%
Dec	41.3	5.4%	43.6	-7.0%	25.4	-7.3%	16.5	7.4%	16.2	-11.1%	9.6	-9.4%
Total	455.2		486.8		429.6		188.1		192.5		159.4	

Coventry and Warwickshire LEP LCEGS Sales Comparing Consecutive Months – Level 1 Renewable Energy, Level 2 Wind and Geothermal

	Wind						Geothermal					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	47.3	-	39.0	-12.0%	50.5	-1.8%	11.5	-	11.5	-12.9%	13.9	-2.8%
Feb	35.6	-24.7%	46.3	18.7%	41.9	-17.1%	11.8	2.6%	12.3	7.3%	10.8	-22.0%
Mar	36.4	2.2%	48.6	4.9%	48.5	15.8%	11.3	-4.1%	12.7	2.6%	13.3	22.8%
Apr	45.5	25.0%	46.0	-5.4%	46.8	-3.4%	13.5	19.1%	12.8	1.1%	12.7	-4.7%
May	47.9	5.2%	50.0	8.7%	45.0	-3.8%	11.8	-12.3%	12.2	-4.7%	12.1	-4.7%
Jun	47.1	-1.6%	40.5	-18.9%	43.4	-3.7%	12.0	1.3%	12.3	1.3%	11.4	-5.4%
Jul	44.5	-5.5%	46.3	14.3%	41.4	-4.5%	12.1	1.0%	11.5	-6.7%	10.7	-6.1%
Aug	44.0	-1.2%	48.8	5.4%	39.5	-4.8%	11.2	-7.7%	11.5	0.1%	10.0	-6.9%
Sep	45.0	2.3%	47.3	-3.1%	37.1	-5.9%	11.1	-1.0%	13.5	17.2%	9.3	-6.6%
Oct	42.8	-4.9%	47.8	1.1%	34.5	-7.0%	12.8	15.8%	12.5	-7.6%	8.7	-7.1%
Nov	49.8	16.3%	55.0	15.2%	32.0	-7.2%	14.1	10.4%	15.4	23.4%	8.1	-6.9%
Dec	44.3	-11.1%	51.4	-6.5%	29.8	-6.9%	13.2	-6.5%	14.3	-7.0%	7.5	-7.4%
Total	530.3		566.8		490.4		146.5		152.5		128.5	

Coventry and Warwickshire LEP LCEGS Sales Comparing Consecutive Months – Level 1 Renewable Energy, Level 2 Photovoltaic and Biomass

	Photovoltaic						Biomass					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	32.8	-	27.9	-12.0%	28.9	-17.4%	18.8	-	19.6	-5.3%	22.7	1.8%
Feb	26.2	-20.1%	30.5	9.4%	27.2	-6.0%	17.3	-7.7%	18.4	-6.1%	18.8	-17.4%
Mar	27.2	3.7%	31.1	2.1%	33.2	21.9%	14.6	-15.6%	18.4	-0.2%	21.1	12.5%
Apr	30.2	11.0%	30.3	-2.6%	32.5	-1.9%	19.6	34.0%	21.4	16.5%	20.7	-1.8%
May	29.8	-1.1%	29.1	-3.9%	31.0	-4.8%	20.8	6.3%	21.1	-1.7%	19.6	-5.4%
Jun	29.4	-1.5%	29.6	1.7%	30.1	-2.9%	17.8	-14.7%	17.7	-16.2%	18.9	-3.5%
Jul	31.0	5.6%	29.5	-0.3%	28.5	-5.3%	18.3	3.0%	18.4	4.3%	17.8	-6.1%
Aug	26.9	-13.2%	30.3	2.7%	26.9	-5.6%	17.8	-2.8%	21.4	16.4%	16.7	-6.2%
Sep	31.5	17.1%	30.9	1.8%	25.5	-5.3%	17.9	0.8%	20.8	-3.0%	15.7	-5.5%
Oct	31.4	-0.5%	32.5	5.3%	23.2	-8.8%	18.6	3.8%	19.9	-4.3%	14.3	-8.9%
Nov	28.8	-8.2%	37.4	15.0%	21.3	-8.2%	21.4	14.7%	20.6	3.4%	13.3	-7.0%
Dec	31.7	10.2%	35.0	-6.4%	19.4	-8.9%	20.7	-3.3%	22.3	8.2%	12.1	-9.0%
Total	357.0		374.2		327.7		223.5		240.0		211.7	

Coventry and Warwickshire LEP LCEGS Sales Comparing Consecutive Months – Level 1 Environmental, Level 2 Water and Waste Water and Waste Management

	Water and Waste Water						Waste Management					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	23.7	-	21.5	-11.9%	21.3	-9.7%	19.6	-	18.0	-6.7%	21.0	-6.7%
Feb	19.1	-19.5%	22.4	4.2%	19.7	-7.5%	16.4	-16.5%	19.3	7.5%	18.5	-11.7%
Mar	18.1	-5.0%	21.3	-4.7%	21.8	10.3%	18.1	10.4%	19.4	0.5%	18.9	2.2%
Apr	23.7	30.6%	21.9	2.6%	21.3	-2.2%	18.3	0.9%	22.1	13.7%	18.3	-3.3%
May	23.3	-1.3%	22.5	2.7%	20.9	-1.8%	18.4	1.0%	21.2	-3.8%	17.8	-2.9%
Jun	22.8	-2.3%	20.0	-11.3%	19.9	-4.5%	18.5	0.2%	21.1	-0.4%	17.2	-3.5%
Jul	21.1	-7.4%	23.5	17.7%	19.3	-3.3%	19.5	5.4%	18.1	-14.3%	16.4	-4.4%
Aug	20.0	-5.3%	24.3	3.7%	18.1	-5.9%	17.1	-12.3%	20.1	11.1%	15.3	-6.5%
Sep	23.1	15.7%	22.9	-6.1%	16.8	-7.2%	18.3	7.1%	19.8	-1.8%	14.4	-5.9%
Oct	22.3	-3.5%	21.7	-5.2%	15.4	-8.7%	17.8	-2.5%	22.1	11.9%	13.5	-6.4%
Nov	21.5	-3.7%	25.5	17.5%	14.0	-9.1%	18.9	5.9%	22.0	-0.6%	12.6	-6.7%
Dec	24.4	13.7%	23.6	-7.4%	12.7	-9.3%	19.3	2.2%	22.5	2.6%	11.5	-8.7%
Total	263.2		271.0		221.2		220.0		245.7		195.4	

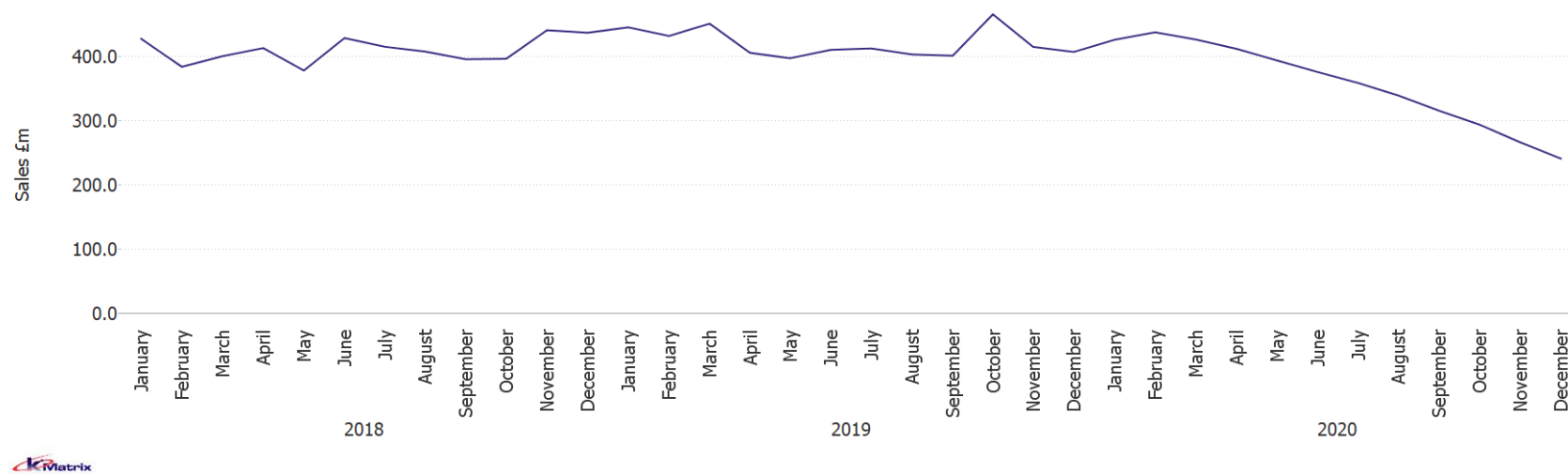
Coventry and Warwickshire LEP LCEGS Sales Comparing Consecutive Months – Level 1 Environmental, Level 2 Recovery & Recycling

	Recovery & Recycling					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	15.2	-	14.1	-13.0%	16.7	-1.8%
Feb	14.3	-5.9%	15.0	6.2%	15.1	-9.1%
Mar	11.7	-18.3%	17.5	16.4%	17.4	15.1%
Apr	13.8	18.1%	17.5	0.2%	16.6	-4.6%
May	14.7	6.3%	16.5	-5.8%	16.1	-3.4%
Jun	15.8	7.6%	15.4	-6.8%	15.2	-5.3%
Jul	15.2	-3.8%	15.3	-0.1%	14.6	-3.9%
Aug	13.1	-13.6%	16.1	4.9%	13.8	-5.9%
Sep	14.1	7.4%	16.7	3.8%	13.1	-4.8%
Oct	14.8	4.9%	15.0	-10.0%	12.3	-5.9%
Nov	16.9	14.2%	17.0	13.3%	11.6	-5.7%
Dec	16.2	-4.2%	17.0	-0.4%	10.5	-9.5%
Total	175.9		193.1		173.0	

Appendix C – Derby, Derbyshire, Nottingham, Nottinghamshire LEP

Sector LCEGS Line Graphs – Sales, Companies and Employees

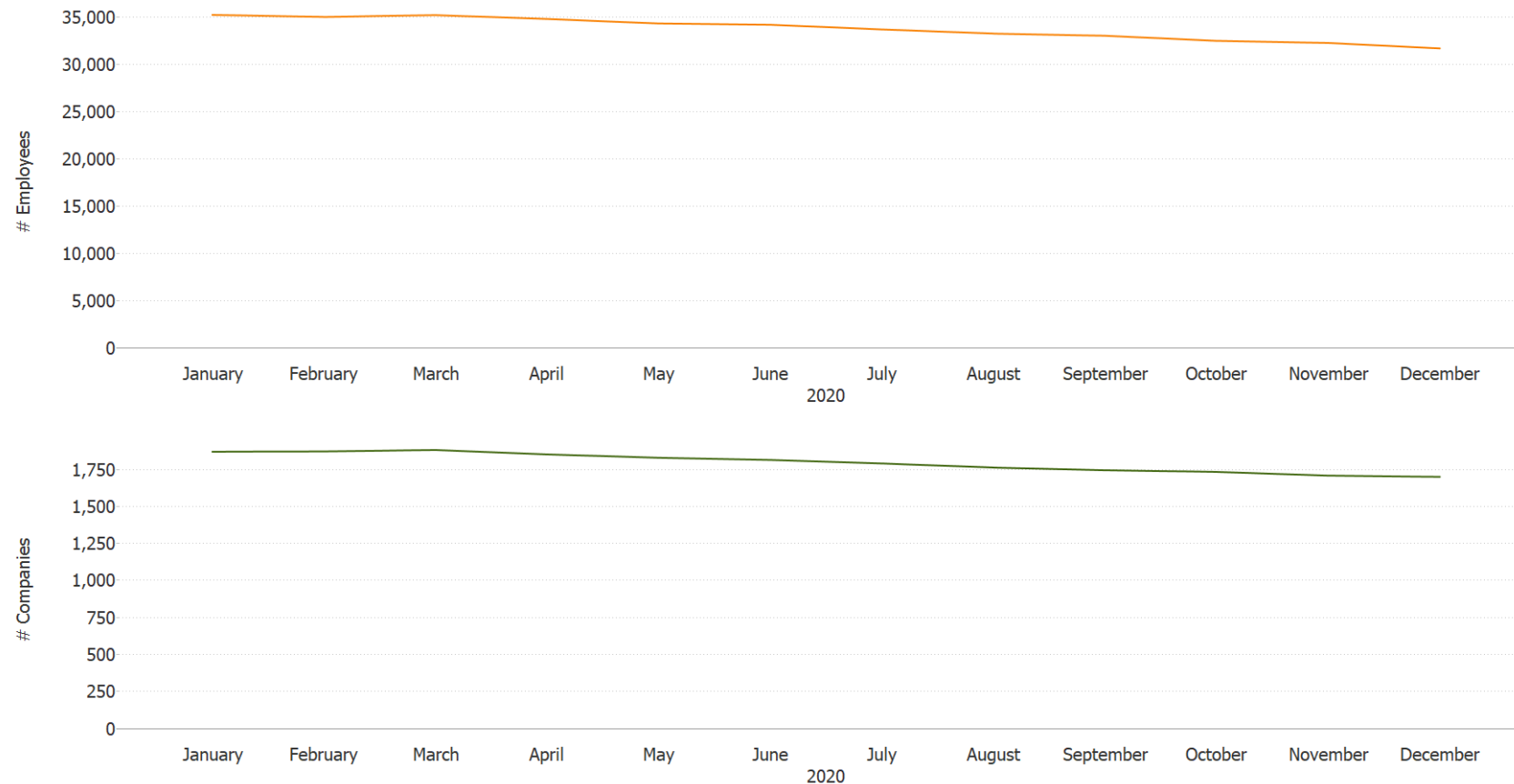
D2N2 LEP LCEGS Sales by month from January 2018 through to December 2020



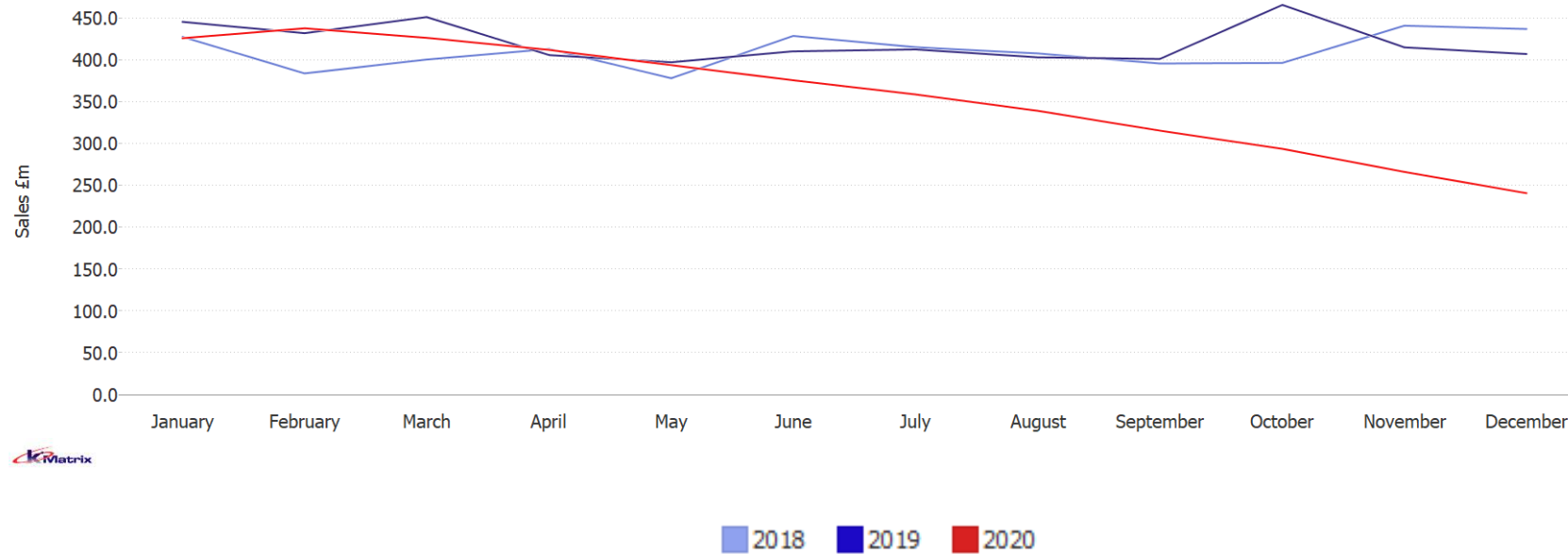
The variability of the sales value per month is normal and to be expected, what we can see is that a line of best fit would indicate overall growth in the sector between January 2018 and March 2020, followed by the contraction of the sector from March onwards.

D2N2 LEP LCEGS Number of Employees and Companies by month from January 2020 through to December 2020

Monthly company and employee figures do fluctuate slightly month-to-month, in a normal year, however the continued decline from March onwards is not normal.

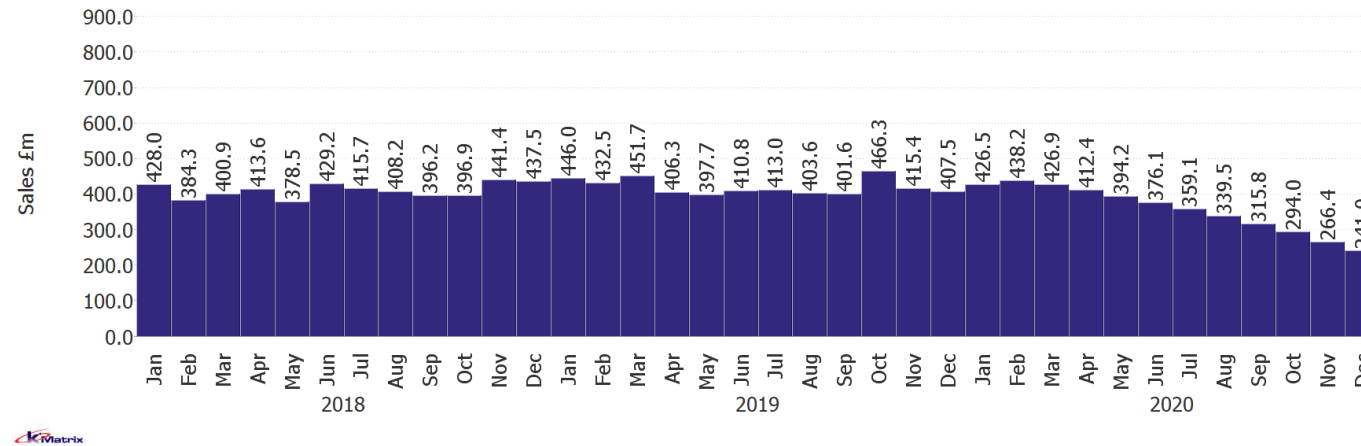


D2N2 LEP LCEGS Sales by month, split by calendar year

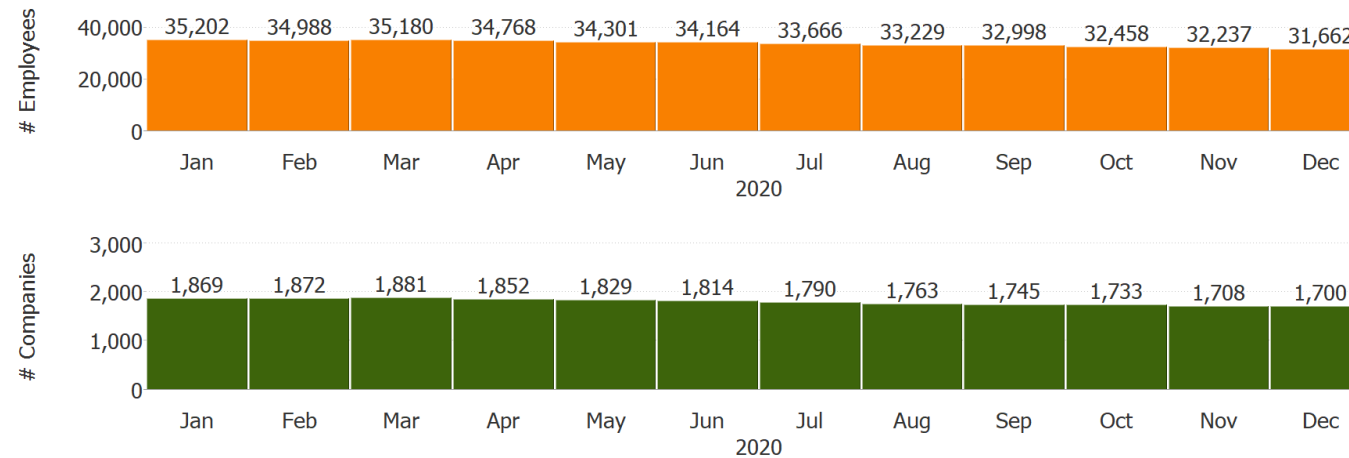


Sector LCEGS Histograms – Sales, Companies and Employees

D2N2 LEP LCEGS Sales



D2N2 LEP LCEGS Number of Employees and Companies



Sector, Level 1 & 2 LCEGS Data Tables – Sales

Sector

D2N2 LEP LCEGS Comparing Growth in Consecutive Months – Sector Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	428.0	-	446.0	1.9%	426.5	4.7%
February	384.3	-10.2%	432.5	-3.0%	438.2	2.8%
March	400.9	4.3%	451.7	4.5%	426.9	-2.6%
April	413.6	3.2%	406.3	-10.1%	412.4	-3.4%
May	378.5	-8.5%	397.7	-2.1%	394.2	-4.4%
June	429.2	13.4%	410.8	3.3%	376.1	-4.6%
July	415.7	-3.2%	413.0	0.5%	359.1	-4.5%
August	408.2	-1.8%	403.6	-2.3%	339.5	-5.5%
September	396.2	-3.0%	401.6	-0.5%	315.8	-7.0%
October	396.9	0.2%	466.3	16.1%	294.0	-6.9%
November	441.4	11.2%	415.4	-10.9%	266.4	-9.4%
December	437.5	-0.9%	407.5	-1.9%	241.0	-9.5%
Total	4,930.4		5,052.3		4,290.1	

Level 1

D2N2 LEP LCEGS Comparing Growth in Consecutive Months – Low Carbon Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	161.2	-	169.2	-0.2%	162.8	3.8%
February	151.7	-5.9%	159.8	-5.6%	164.3	1.0%
March	154.7	2.0%	163.3	2.2%	164.6	0.2%
April	161.1	4.1%	163.2	-0.1%	158.8	-3.5%
May	149.4	-7.3%	148.5	-9.0%	151.4	-4.7%
June	166.0	11.1%	155.9	5.0%	145.4	-3.9%
July	149.0	-10.2%	160.1	2.7%	139.4	-4.2%
August	156.8	5.2%	157.1	-1.9%	130.1	-6.7%
September	145.2	-7.4%	152.2	-3.1%	120.7	-7.3%
October	146.8	1.1%	171.6	12.7%	111.9	-7.2%
November	176.3	20.1%	152.1	-11.3%	101.6	-9.2%
December	169.5	-3.9%	156.8	3.1%	91.1	-10.3%
Total	1,887.8		1,909.9		1,642.1	

D2N2 LEP LCEGS Comparing Growth in Consecutive Months – Renewable Energy Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	169.3	-	176.8	3.3%	171.1	6.6%
February	147.4	-12.9%	174.6	-1.3%	177.3	3.6%
March	160.0	8.6%	188.2	7.8%	170.5	-3.9%
April	166.6	4.1%	158.3	-15.9%	165.0	-3.2%
May	143.7	-13.7%	154.9	-2.1%	157.8	-4.4%
June	169.0	17.6%	163.0	5.2%	150.3	-4.7%
July	169.2	0.1%	160.2	-1.7%	142.8	-5.0%
August	159.6	-5.7%	158.4	-1.1%	136.0	-4.7%
September	158.3	-0.8%	155.8	-1.7%	126.9	-6.7%
October	161.1	1.8%	190.8	22.5%	118.1	-6.9%
November	169.7	5.4%	171.9	-9.9%	106.8	-9.6%
December	171.1	0.8%	160.5	-6.7%	97.1	-9.1%
Total	1,944.9		2,013.5		1,719.7	

D2N2 LEP LCEGS Comparing Growth in Consecutive Months – Environmental Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	97.6	-	99.9	3.2%	92.6	2.5%
February	85.3	-12.6%	98.1	-1.8%	96.6	4.4%
March	86.2	1.1%	100.2	2.2%	91.8	-5.0%
April	85.9	-0.4%	84.8	-15.4%	88.7	-3.4%
May	85.4	-0.6%	94.2	11.0%	85.1	-4.1%
June	94.2	10.3%	91.9	-2.4%	80.4	-5.5%
July	97.5	3.5%	92.6	0.8%	77.0	-4.3%
August	91.9	-5.8%	88.0	-5.0%	73.4	-4.6%
September	92.7	0.9%	93.6	6.4%	68.2	-7.1%
October	89.0	-4.0%	103.9	11.0%	64.0	-6.2%
November	95.4	7.2%	91.4	-12.0%	58.1	-9.2%
December	96.8	1.5%	90.3	-1.2%	52.8	-9.1%
Total	1,097.8		1,128.9		928.7	

Although there have been fluctuations in sales on a month-by-month basis prior to Covid-19, this is normal fluctuation. There has been a consistent drop in growth each month between April to December in 2020 in all three Level 1 sub-sectors, indicating a continued contraction of the market.

Level 2

D2N2 LEP LCEGS Sales Comparing Consecutive Months – Level 1 Low Carbon, Level 2 Energy Management and Building Technologies

	Energy Management						Building Technologies					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	8.4	-	10.2	6.3%	9.6	10.3%	56.7	-	68.1	6.2%	62.8	3.6%
Feb	7.7	-7.6%	9.2	-9.7%	9.0	-5.9%	61.3	8.1%	58.0	-14.9%	65.4	4.1%
Mar	7.9	2.7%	10.4	12.8%	9.9	9.3%	61.9	1.0%	62.1	7.0%	67.0	2.4%
Apr	9.4	19.0%	8.7	-16.3%	9.5	-3.9%	62.6	1.1%	57.5	-7.4%	64.8	-3.3%
May	8.9	-5.9%	8.0	-7.9%	9.2	-2.8%	54.7	-12.6%	55.7	-3.1%	62.2	-4.0%
Jun	9.9	11.8%	9.1	14.1%	8.7	-5.6%	64.0	17.0%	57.9	4.0%	59.5	-4.3%
Jul	8.2	-17.4%	9.2	1.3%	8.1	-6.6%	56.4	-11.9%	57.7	-0.4%	56.9	-4.4%
Aug	9.5	16.3%	8.8	-4.2%	7.7	-5.2%	61.2	8.5%	65.6	13.7%	54.4	-4.4%
Sep	8.6	-10.2%	9.2	3.9%	7.1	-7.2%	53.9	-11.9%	55.0	-16.2%	50.8	-6.6%
Oct	8.5	-1.2%	10.3	12.4%	6.7	-6.8%	55.1	2.4%	61.9	12.6%	47.0	-7.5%
Nov	9.1	7.7%	8.4	-18.7%	6.1	-9.0%	69.2	25.5%	55.6	-10.1%	42.2	-10.2%
Dec	9.6	5.0%	8.7	3.9%	5.5	-9.8%	64.1	-7.4%	60.6	9.0%	37.7	-10.7%
Total	105.6		110.2		97.1		720.9		715.6		670.7	

D2N2 LEP LCEGS Sales Comparing Consecutive Months – Level 1 Low Carbon, Level 2 Alternative Fuels and Alternative Fuel Vehicles

	Alternative fuels						Alternative Fuel Vehicle					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	68.9	-	58.9	-10.1%	63.6	-8.0%	22.3	-	26.5	6.4%	21.8	7.9%
Feb	55.8	-19.0%	63.2	7.4%	58.5	0.0%	22.3	-0.2%	24.2	-8.8%	25.9	18.8%
Mar	58.8	5.5%	61.7	-2.5%	58.5	-1.7%	21.5	-3.6%	23.6	-2.2%	24.0	-7.3%
Apr	59.7	1.5%	67.4	9.3%	57.5	-5.7%	24.1	12.5%	24.6	4.2%	22.0	-8.3%
May	59.8	0.1%	58.4	-13.4%	54.2	-1.5%	21.0	-12.9%	21.7	-11.9%	21.1	-4.1%
Jun	61.3	2.5%	61.6	5.5%	53.4	-3.4%	25.3	20.3%	22.0	1.2%	19.3	-8.5%
Jul	54.0	-11.8%	64.3	4.4%	51.6	-9.1%	25.5	0.6%	23.7	7.9%	18.4	-4.7%
Aug	59.7	10.5%	55.2	-14.2%	46.9	-8.3%	21.6	-15.3%	22.1	-6.8%	17.1	-7.1%
Sep	56.9	-4.7%	62.4	13.1%	43.0	-6.7%	21.3	-1.3%	21.2	-4.0%	16.0	-6.4%
Oct	58.0	1.9%	70.7	13.3%	40.1	-9.0%	20.9	-1.8%	23.2	9.5%	14.7	-8.1%
Nov	69.3	19.6%	61.0	-13.7%	36.5	-10.7%	23.3	11.7%	21.9	-5.7%	13.6	-7.5%
Dec	65.5	-5.5%	62.0	1.6%	32.6	-8.0%	24.9	6.6%	20.2	-7.5%	12.4	-8.8%
Total	727.5		746.8		596.4		273.8		275.0		226.3	

D2N2 LEP LCEGS Sales Comparing Consecutive Months – Level 1 Renewable Energy, Level 2 Wind and Geothermal

	Wind						Geothermal					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	79.1	-	70.3	-4.1%	70.4	-0.3%	16.8	-	22.5	6.1%	19.6	11.4%
Feb	60.0	-24.1%	72.6	3.2%	73.2	4.0%	17.1	1.7%	21.1	-6.0%	20.3	3.6%
Mar	66.8	11.3%	80.8	11.3%	71.0	-3.0%	17.9	4.6%	17.8	-15.5%	19.6	-3.4%
Apr	73.4	9.9%	67.1	-16.9%	69.4	-2.3%	17.3	-3.1%	16.9	-5.1%	18.7	-4.6%
May	57.8	-21.2%	64.7	-3.6%	66.9	-3.6%	16.7	-3.6%	16.3	-4.0%	17.7	-5.3%
Jun	73.0	26.4%	67.7	4.6%	63.9	-4.5%	19.5	16.4%	18.2	12.1%	16.9	-4.5%
Jul	66.1	-9.5%	69.1	2.1%	61.0	-4.5%	19.2	-1.3%	18.4	0.8%	16.1	-4.7%
Aug	68.3	3.2%	65.2	-5.6%	58.0	-4.9%	16.5	-13.9%	17.1	-7.2%	15.1	-6.2%
Sep	66.3	-2.8%	60.3	-7.5%	54.5	-6.0%	18.0	8.7%	16.9	-1.1%	14.0	-7.3%
Oct	70.4	6.1%	83.4	38.2%	50.2	-7.9%	17.5	-2.6%	20.0	18.6%	13.0	-7.1%
Nov	69.1	-1.8%	73.1	-12.3%	45.3	-9.8%	18.9	8.1%	17.2	-14.1%	11.8	-9.2%
Dec	73.3	6.0%	70.6	-3.5%	40.8	-9.9%	21.2	12.0%	17.6	2.2%	10.7	-9.3%
Total	823.6		844.8		724.6		216.7		219.9		193.5	

D2N2 LEP LCEGS Sales Comparing Consecutive Months – Level 1 Renewable Energy, Level 2 Photovoltaic and Biomass

	Photovoltaic						Biomass					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	41.5	-	47.8	9.9%	47.1	18.9%	28.4	-	32.5	10.5%	30.9	4.4%
Feb	40.2	-3.1%	44.0	-8.0%	50.4	7.0%	26.9	-5.3%	33.3	2.5%	30.1	-2.6%
Mar	43.4	7.8%	51.2	16.4%	46.0	-8.7%	28.6	6.0%	34.7	4.2%	30.5	1.3%
Apr	40.4	-6.9%	39.7	-22.5%	44.2	-3.9%	32.1	12.4%	31.4	-9.6%	29.4	-3.6%
May	36.7	-9.1%	40.1	1.0%	42.0	-5.0%	29.7	-7.6%	30.3	-3.6%	28.1	-4.4%
Jun	44.8	22.0%	42.2	5.4%	39.7	-5.5%	28.5	-4.0%	31.4	3.8%	26.8	-4.6%
Jul	48.5	8.2%	41.6	-1.5%	37.6	-5.3%	31.8	11.6%	27.9	-11.2%	25.3	-5.6%
Aug	41.7	-14.0%	42.0	1.0%	36.1	-4.0%	29.8	-6.1%	30.7	10.0%	24.2	-4.3%
Sep	43.0	3.3%	43.5	3.7%	33.5	-7.2%	27.7	-7.3%	31.9	3.9%	22.4	-7.4%
Oct	42.9	-0.4%	48.4	11.1%	31.5	-6.0%	26.9	-2.6%	35.3	10.6%	21.2	-5.4%
Nov	44.8	4.6%	46.0	-5.0%	28.6	-9.2%	33.5	24.5%	32.2	-8.8%	19.0	-10.4%
Dec	43.5	-2.9%	39.6	-13.9%	26.3	-8.0%	29.4	-12.2%	29.6	-7.8%	17.3	-8.9%
Total	511.4		526.0		463.0		353.4		381.3		305.2	

D2N2 LEP LCEGS Sales Comparing Consecutive Months – Level 1 Environmental, Level 2 Water and Waste Water and Waste Management

	Water and Waste Water						Waste Management					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	31.3	-	33.8	-2.9%	31.5	5.0%	30.6	-	27.9	-6.1%	28.8	-1.4%
Feb	28.5	-9.0%	33.6	-0.3%	33.4	6.0%	25.6	-16.5%	30.4	9.0%	29.8	3.5%
Mar	29.1	2.0%	34.4	2.2%	31.8	-4.8%	25.9	1.4%	30.2	-0.4%	27.2	-8.7%
Apr	29.9	2.7%	30.1	-12.6%	30.6	-3.8%	25.5	-1.7%	24.9	-17.5%	26.2	-3.7%
May	27.4	-8.2%	33.9	12.6%	29.4	-3.9%	27.3	7.2%	27.0	8.3%	25.0	-4.6%
Jun	31.7	15.7%	34.8	2.8%	27.8	-5.4%	29.8	8.9%	24.7	-8.6%	23.7	-5.2%
Jul	36.4	14.7%	34.1	-2.0%	26.4	-5.0%	26.2	-12.0%	26.9	9.0%	22.7	-4.2%
Aug	32.7	-10.2%	29.8	-12.8%	25.3	-4.2%	28.4	8.4%	27.1	0.7%	21.5	-5.3%
Sep	35.0	7.1%	31.2	4.8%	23.6	-6.7%	25.1	-11.7%	29.0	6.9%	20.0	-7.0%
Oct	32.3	-7.7%	38.1	22.0%	22.3	-5.5%	24.0	-4.3%	29.7	2.5%	18.5	-7.5%
Nov	35.0	8.2%	32.8	-13.7%	20.0	-10.3%	27.0	12.5%	29.2	-1.8%	17.0	-8.1%
Dec	34.8	-0.3%	30.0	-8.6%	18.4	-8.0%	29.7	10.1%	29.2	-0.1%	15.4	-9.4%
Total	384.1		396.5		320.5		325.0		336.4		275.8	

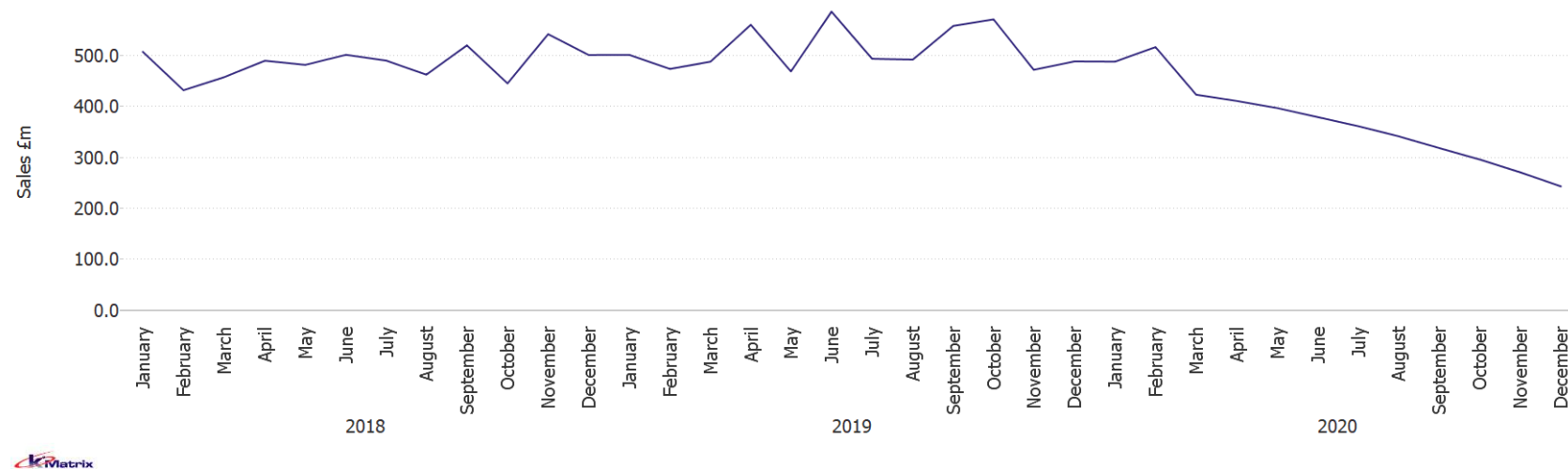
D2N2 LEP LCEGS Sales Comparing Consecutive Months – Level 1 Environmental, Level 2 Recovery & Recycling

	Recovery & Recycling					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	25.6	-	27.0	21.41%	22.5	3.2%
Feb	22.3	-12.7%	24.8	-8.3%	23.9	6.2%
Mar	21.7	-2.8%	24.9	0.4%	22.8	-4.6%
Apr	20.9	-3.9%	20.7	-16.9%	22.1	-3.1%
May	21.5	3.0%	23.9	15.3%	21.3	-3.6%
Jun	22.6	5.0%	23.1	-3.3%	20.1	-5.6%
Jul	25.0	10.8%	22.0	-4.5%	19.4	-3.5%
Aug	21.7	-13.2%	22.0	-0.3%	18.6	-4.1%
Sep	23.2	6.8%	24.4	11.0%	17.1	-8.1%
Oct	23.9	3.3%	25.3	3.8%	16.1	-5.8%
Nov	23.3	-2.6%	20.4	-19.6%	14.7	-8.7%
Dec	22.3	-4.4%	21.8	7.3%	13.2	-10.2%
Total	274.0		280.3		231.8	

Appendix D – Greater Birmingham and Solihull LEP

Sector LCEGS Line Graphs – Sales, Companies and Employees

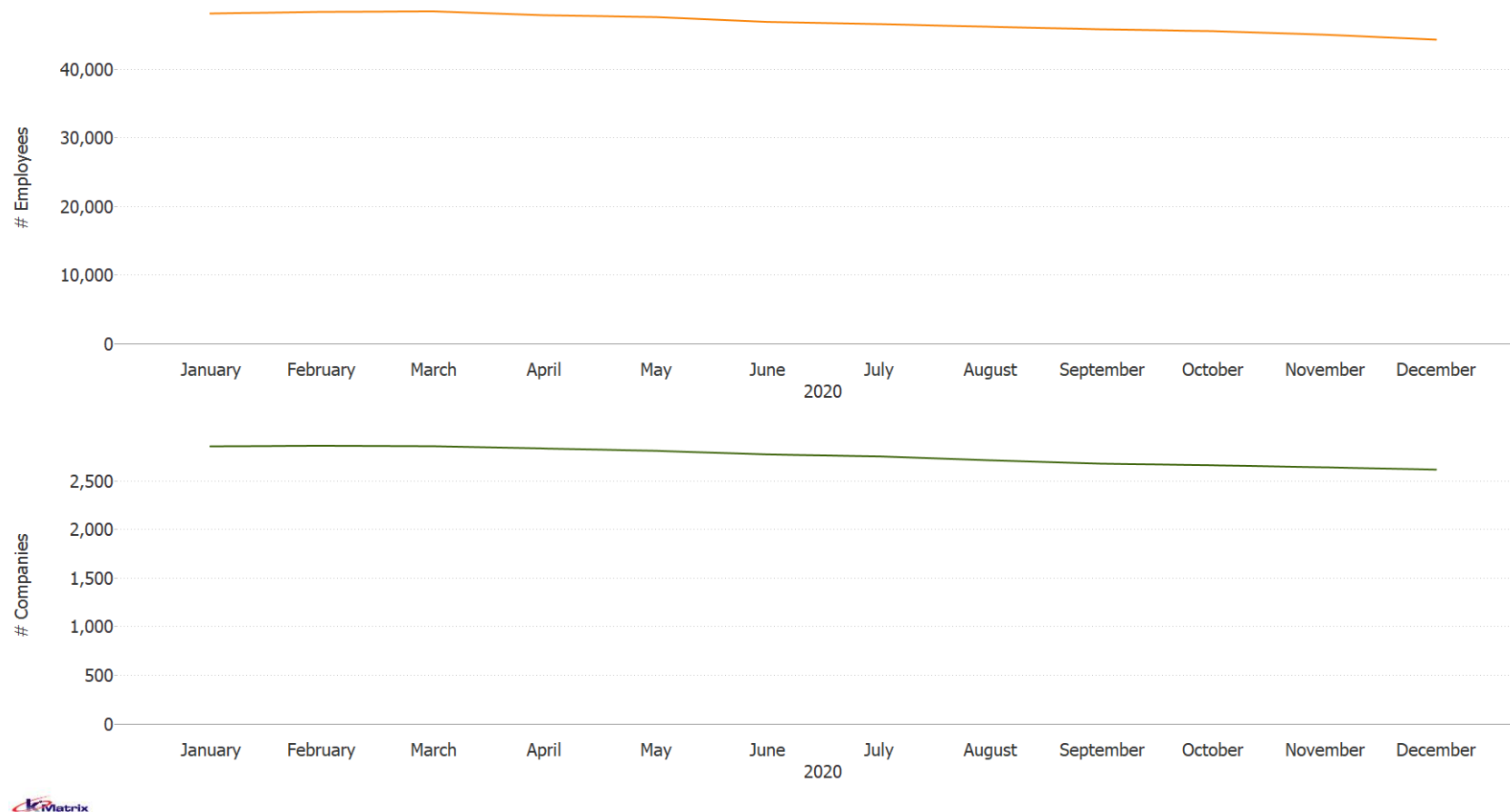
Greater Birmingham and Solihull LEP LCEGS Sales by month from January 2018 through to December 2020



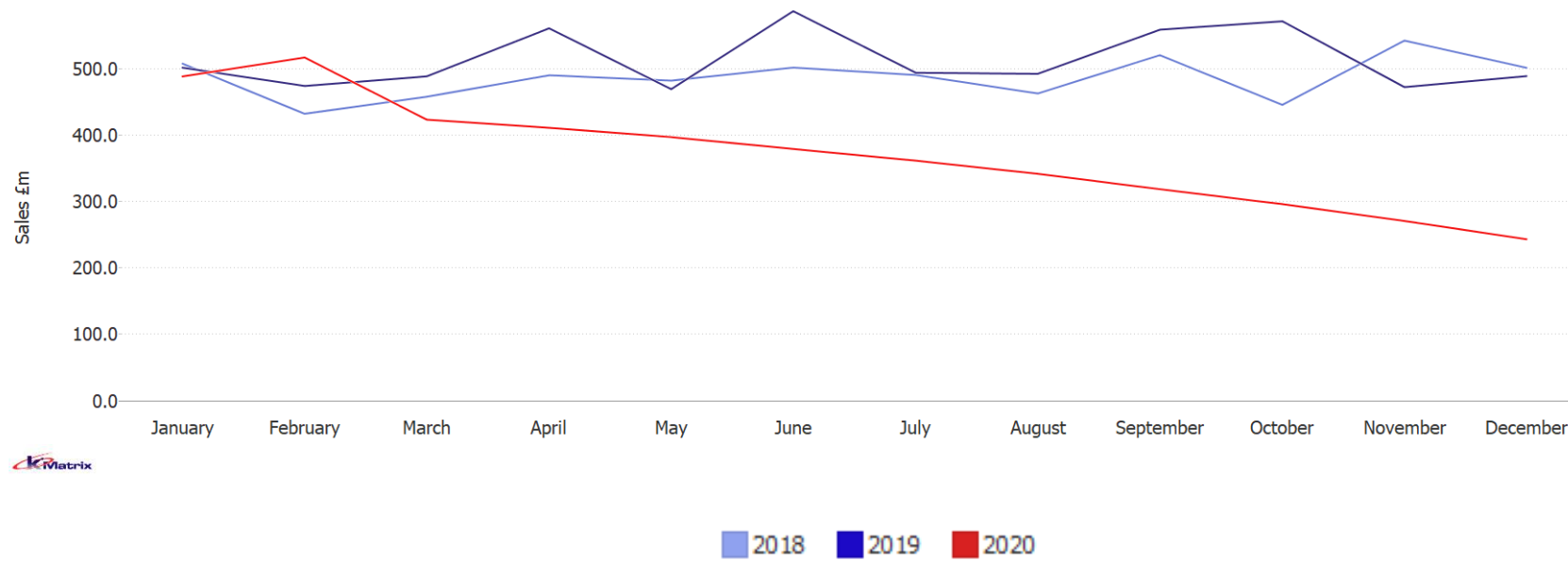
The variability of the sales value per month is normal and to be expected, what we can see is that a line of best fit would indicate overall growth in the sector between January 2018 and March 2020, followed by the contraction of the sector from March onwards.

Greater Birmingham and Solihull LEP LCEGS Number of Employees and Companies by month from January 2020 through to December 2020

Monthly company and employee figures do fluctuate slightly month-to-month, in a normal year, however the continued decline from March onwards is not normal.

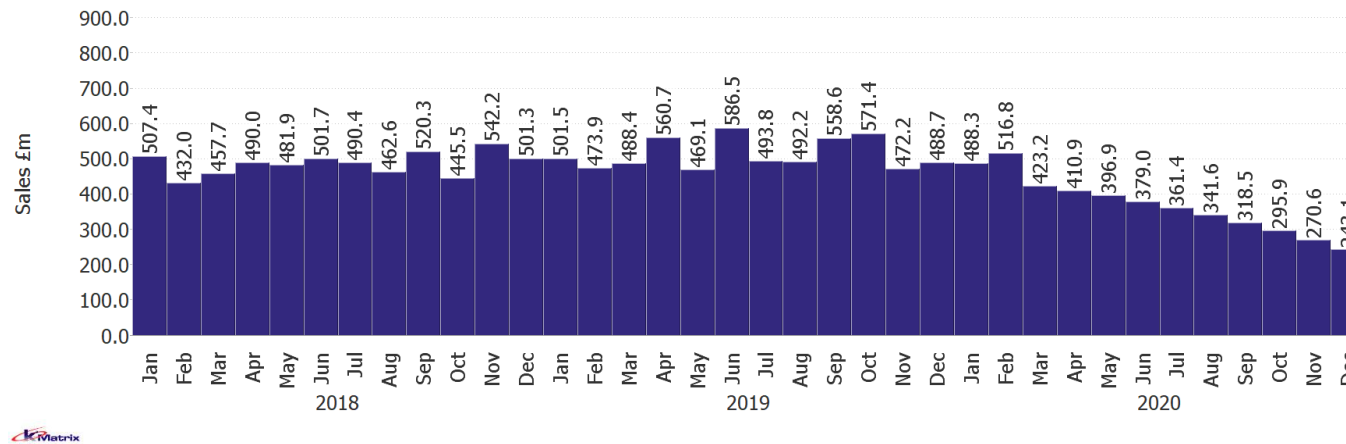


Greater Birmingham and Solihull LEP LCEGS Sales by month, split by calendar year



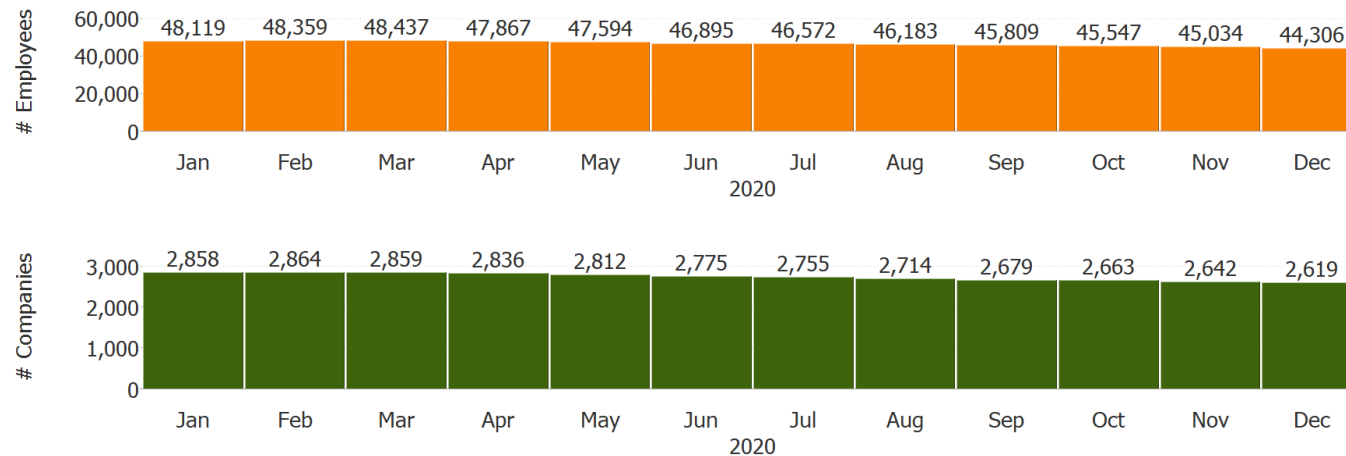
Sector LCEGS Histograms – Sales, Companies and Employees

Greater Birmingham and Solihull LEP LCEGS Sales



KMatrix

Greater Birmingham and Solihull LEP LCEGS Number of Employees and Companies



KMatrix

Sector, Level 1 & 2 LCEGS Data Tables – Sales

Sector

Greater Birmingham and Solihull LEP LCEGS Comparing Growth in Consecutive Months – Sector Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	507.4	-	501.5	0.0%	488.3	-0.1%
February	432.0	-14.9%	473.9	-5.5%	516.8	5.8%
March	457.7	5.9%	488.4	3.0%	423.2	-18.1%
April	490.0	7.1%	560.7	14.8%	410.9	-2.9%
May	481.9	-1.6%	469.1	-16.3%	396.9	-3.4%
June	501.7	4.1%	586.5	25.0%	379.0	-4.5%
July	490.4	-2.2%	493.8	-15.8%	361.4	-4.6%
August	462.6	-5.7%	492.2	-0.3%	341.6	-5.5%
September	520.3	12.5%	558.6	13.5%	318.5	-6.8%
October	445.5	-14.4%	571.4	2.3%	295.9	-7.1%
November	542.2	21.7%	472.2	-17.4%	270.6	-8.6%
December	501.3	-7.6%	488.7	3.5%	243.1	-10.2%
Total	5,833.0		6,157.1		4,446.2	

Level 1

Greater Birmingham and Solihull LEP LCEGS Comparing Growth in Consecutive Months – Low Carbon Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	197.7	-	198.6	-0.3%	192.9	1.0%
February	171.0	-13.5%	189.9	-4.4%	205.6	6.6%
March	185.7	8.6%	185.5	-2.3%	166.2	-19.2%
April	198.2	6.7%	217.2	17.1%	161.1	-3.1%
May	194.5	-1.9%	182.9	-15.8%	156.3	-3.0%
June	206.9	6.3%	239.2	30.8%	148.4	-5.1%
July	197.0	-4.7%	195.2	-18.4%	140.8	-5.1%
August	186.9	-5.1%	202.6	3.8%	130.8	-7.1%
September	200.2	7.1%	224.5	10.8%	122.8	-6.1%
October	183.9	-8.2%	219.9	-2.1%	115.1	-6.3%
November	218.6	18.9%	185.6	-15.6%	106.0	-7.9%
December	199.1	-8.9%	190.9	2.9%	95.8	-9.6%
Total	2,339.8		2,432.0		1,741.8	

Greater Birmingham and Solihull LEP LCEGS Comparing Growth in Consecutive Months – Renewable Energy Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	203.8	-	200.2	1.2%	194.6	0.7%
February	169.8	-16.7%	182.3	-8.9%	200.7	3.1%
March	175.2	3.2%	200.3	9.9%	167.4	-16.6%
April	189.4	8.1%	224.3	12.0%	162.9	-2.7%
May	190.3	0.5%	182.2	-18.8%	157.7	-3.2%
June	191.9	0.8%	221.4	21.5%	151.6	-3.9%
July	190.4	-0.8%	189.6	-14.3%	144.6	-4.6%
August	178.7	-6.1%	189.9	0.1%	138.8	-4.0%
September	207.9	16.3%	213.3	12.3%	128.3	-7.6%
October	168.4	-19.0%	230.7	8.1%	118.9	-7.3%
November	211.6	25.7%	188.2	-18.4%	107.9	-9.3%
December	197.8	-6.6%	193.2	2.6%	96.3	-10.8%
Total	2,275.2		2,415.4		1,769.7	

Greater Birmingham and Solihull LEP LCEGS Comparing Growth in Consecutive Months – Environmental Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	105.9	-	102.7	-1.6%	100.7	-3.7%
February	91.2	-13.9%	101.7	-1.0%	110.5	9.7%
March	96.8	6.1%	102.6	0.9%	89.6	-18.9%
April	102.4	5.8%	119.3	16.2%	86.9	-3.0%
May	97.1	-5.2%	104.0	-12.8%	82.9	-4.6%
June	102.9	6.0%	125.9	21.1%	79.0	-4.7%
July	103.0	0.1%	109.0	-13.5%	76.0	-3.8%
August	97.0	-5.8%	99.7	-8.5%	72.1	-5.1%
September	112.2	15.7%	120.9	21.2%	67.5	-6.4%
October	93.2	-17.0%	120.9	0.0%	61.8	-8.4%
November	112.0	20.2%	98.4	-18.6%	56.7	-8.3%
December	104.4	-6.8%	104.6	6.3%	51.0	-10.1%
Total	1,218.0		1,309.7		934.7	

Although there have been fluctuations in sales on a month-by-month basis prior to Covid-19, this is normal fluctuation. There has been a consistent drop in growth each month between April to December in 2020 in all three Level 1 sub-sectors, indicating a continued contraction of the market.

Level 2

Greater Birmingham and Solihull LEP LCEGS Sales Comparing Consecutive Months – Level 1 Low Carbon, Level 2 Energy Management and Building Technologies

	Energy Management						Building Technologies					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	10.1	-	10.1	-7.3%	10.3	-10.4%	75.2	-	74.2	-4.0%	70.0	1.4%
Feb	9.5	-6.5%	10.4	2.8%	10.0	-2.9%	59.7	-20.6%	76.0	2.4%	73.3	4.7%
Mar	8.6	-9.5%	10.3	-1.1%	9.7	-3.0%	71.7	20.2%	70.0	-7.9%	60.0	-18.1%
Apr	9.2	7.9%	12.7	23.8%	9.3	-4.1%	78.7	9.7%	81.1	15.8%	57.5	-4.2%
May	11.3	22.1%	10.5	-17.2%	9.1	-2.2%	75.9	-3.5%	67.8	-16.4%	55.8	-3.0%
Jun	11.1	-1.8%	12.0	13.4%	8.6	-5.5%	75.2	-0.9%	90.6	33.7%	53.0	-5.0%
Jul	10.4	-5.7%	10.3	-13.5%	8.2	-4.7%	72.7	-3.4%	73.3	-19.1%	50.4	-4.9%
Aug	10.5	1.0%	11.1	7.1%	7.9	-3.7%	76.0	4.6%	73.1	-0.2%	47.9	-5.0%
Sep	10.0	-4.9%	11.5	3.5%	7.4	-6.3%	78.6	3.4%	85.5	16.9%	44.7	-6.7%
Oct	10.0	-0.3%	11.2	-2.1%	6.8	-8.1%	70.4	-10.4%	89.5	4.7%	41.4	-7.4%
Nov	11.8	18.5%	10.6	-6.0%	6.2	-8.8%	82.6	17.3%	68.1	-23.9%	37.9	-8.5%
Dec	10.9	-8.3%	11.5	9.2%	5.6	-9.7%	77.3	-6.4%	69.0	1.4%	34.1	-10.0%
Total	123.4		132.3		99.1		894.0		918.2		626.0	

Greater Birmingham and Solihull LEP LCEGS Sales Comparing Consecutive Months – Level 1 Low Carbon, Level 2 Alternative Fuels and Alternative Fuel Vehicles

	Alternative fuels						Alternative Fuel Vehicle					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	68.5	-	70.9	1.3%	69.0	2.2%	28.1	-	26.9	12.6%	27.1	-0.4%
Feb	66.1	-3.4%	62.1	-12.3%	75.4	9.3%	21.6	-23.1%	25.9	-3.8%	29.9	10.3%
Mar	65.1	-1.6%	64.1	3.1%	60.7	-19.5%	25.4	17.8%	25.4	-2.1%	22.6	-24.4%
Apr	70.0	7.6%	75.7	18.1%	60.1	-1.0%	25.3	-0.5%	28.8	13.5%	21.5	-4.9%
May	63.2	-9.7%	60.9	-19.6%	58.2	-3.2%	28.6	13.2%	27.3	-5.3%	21.0	-2.3%
Jun	73.9	17.0%	83.4	37.0%	55.4	-4.8%	29.9	4.2%	34.9	28.1%	20.0	-4.8%
Jul	69.6	-5.9%	67.9	-18.5%	52.4	-5.4%	27.7	-7.2%	26.2	-24.9%	18.8	-6.0%
Aug	60.7	-12.8%	73.5	8.2%	47.4	-9.5%	23.5	-15.1%	27.6	5.2%	17.2	-8.5%
Sep	65.1	7.2%	74.9	1.8%	44.9	-5.3%	28.5	21.2%	33.2	20.5%	16.0	-7.0%
Oct	67.0	2.9%	70.1	-6.4%	43.2	-3.8%	21.6	-24.3%	31.3	-6.0%	14.7	-8.1%
Nov	77.9	16.3%	64.6	-7.9%	40.1	-7.2%	27.7	28.2%	25.5	-18.4%	13.7	-6.8%
Dec	70.0	-10.1%	67.5	4.6%	36.8	-8.2%	23.9	-13.4%	27.2	6.7%	12.1	-11.7%
Total	817.0		835.5		643.6		311.8		340.1		234.6	

Greater Birmingham and Solihull LEP LCEGS Sales Comparing Consecutive Months – Level 1 Low Carbon, Level 2 Carbon Finance

	Recovery & Recycling					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	10.5	-	10.9	0.0%	11.1	13.3%
Feb	9.0	-14.3%	10.1	-7.3%	11.5	3.6%
Mar	9.1	1.5%	10.1	0.0%	8.4	-27.0%
Apr	9.7	6.9%	12.3	21.8%	8.1	-3.6%
May	10.1	4.3%	10.8	-12.2%	7.7	-4.9%
Jun	10.8	6.7%	11.8	8.7%	7.2	-6.5%
Jul	10.6	-2.0%	11.5	-2.3%	6.9	-4.2%
Aug	10.4	-1.4%	11.3	-1.6%	6.5	-5.8%
Sep	11.8	13.1%	13.0	15.2%	6.0	-7.7%
Oct	9.3	-21.2%	11.4	-12.7%	5.7	-5.0%
Nov	12.2	31.1%	10.9	-3.8%	5.0	-12.3%
Dec	10.9	-11.0%	9.8	-10.7%	4.5	-10.0%
Total	124.3		133.9		88.6	

Greater Birmingham and Solihull LEP LCEGS Sales Comparing Consecutive Months – Level 1 Renewable Energy, Level 2 Wind and Geothermal

	Wind						Geothermal					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	84.0	-	81.7	-4.2%	83.0	8.5%	20.7	-	21.8	-8.4%	19.1	-16.2%
Feb	70.3	-16.3%	71.4	-12.6%	79.8	-3.9%	18.6	-9.7%	20.4	-6.3%	23.5	23.0%
Mar	67.3	-4.4%	85.3	19.4%	71.6	-10.3%	19.2	2.9%	22.8	11.7%	16.3	-30.6%
Apr	76.2	13.3%	96.9	13.6%	69.2	-3.4%	22.2	15.8%	24.1	5.8%	15.5	-4.9%
May	75.6	-0.8%	73.2	-24.4%	67.7	-2.2%	20.8	-6.2%	21.6	-10.6%	14.8	-4.5%
Jun	84.7	12.1%	93.8	28.1%	65.2	-3.7%	20.2	-3.2%	25.0	15.9%	14.1	-4.7%
Jul	79.7	-5.9%	79.9	-14.9%	61.9	-5.1%	21.6	7.0%	21.9	-12.2%	13.5	-4.3%
Aug	76.7	-3.8%	76.7	-4.0%	60.1	-2.9%	21.2	-1.6%	23.0	4.7%	13.0	-3.7%
Sep	86.6	12.9%	93.0	21.3%	55.2	-8.2%	23.3	9.7%	26.3	14.6%	12.2	-6.2%
Oct	68.6	-20.7%	100.8	8.4%	51.5	-6.7%	19.2	-17.6%	23.6	-10.3%	10.9	-10.7%
Nov	90.1	31.3%	75.4	-25.2%	47.0	-8.7%	24.4	27.1%	21.8	-7.7%	10.0	-8.3%
Dec	85.3	-5.3%	76.5	1.5%	42.2	-10.2%	23.8	-2.3%	22.8	4.7%	8.6	-14.0%
Total	945.1		1,004.6		754.4		255.2		275.0		171.5	

Greater Birmingham and Solihull LEP LCEGS Sales Comparing Consecutive Months – Level 1 Renewable Energy, Level 2 Photovoltaic and Biomass

	Photovoltaic						Biomass					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	56.2	-	55.7	7.1%	53.0	3.1%	39.4	-	37.4	12.3%	35.8	-8.2%
Feb	44.3	-21.1%	54.5	-2.1%	55.1	4.0%	33.2	-15.7%	32.3	-13.6%	38.7	8.1%
Mar	50.2	13.1%	55.7	2.2%	47.2	-14.3%	35.5	7.0%	32.9	1.9%	29.3	-24.3%
Apr	54.5	8.7%	57.2	2.7%	46.2	-2.1%	32.8	-7.6%	41.7	26.7%	29.0	-1.0%
May	55.1	1.0%	47.4	-17.2%	44.4	-3.9%	35.2	7.4%	36.7	-12.0%	28.0	-3.4%
Jun	46.6	-15.4%	56.0	18.2%	42.9	-3.4%	36.8	4.5%	42.7	16.4%	26.8	-4.3%
Jul	47.0	1.0%	47.5	-15.2%	40.7	-5.1%	38.6	4.7%	36.7	-14.1%	25.9	-3.4%
Aug	47.0	0.0%	49.9	5.0%	38.6	-5.2%	30.8	-20.2%	36.9	0.7%	24.6	-5.0%
Sep	58.3	24.1%	53.1	6.5%	35.7	-7.5%	35.9	16.6%	36.8	-0.3%	22.9	-6.9%
Oct	45.6	-21.8%	57.4	8.1%	33.2	-7.0%	31.9	-11.2%	44.6	21.1%	21.2	-7.4%
Nov	58.0	27.1%	52.6	-8.4%	29.6	-10.8%	35.5	11.5%	34.8	-21.9%	19.5	-8.0%
Dec	52.0	-10.3%	51.4	-2.2%	26.2	-11.5%	33.3	-6.1%	39.0	11.9%	17.3	-11.3%
Total	614.9		638.5		492.8		418.9		452.3		319.0	

Greater Birmingham and Solihull LEP LCEGS Sales Comparing Consecutive Months – Level 1 Environmental, Level 2 Water and Waste Water and Waste Management

	Water and Waste Water						Waste Management					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	36.9	-	35.0	-7.7%	38.3	6.7%	31.7	-	29.9	-6.3%	28.5	-15.9%
Feb	31.9	-13.6%	35.2	0.5%	38.0	-0.8%	27.0	-14.7%	30.3	1.3%	33.7	18.2%
Mar	30.6	-4.0%	38.5	9.3%	31.7	-16.6%	31.3	15.7%	29.1	-3.7%	25.3	-24.9%
Apr	36.7	20.0%	41.5	8.0%	30.6	-3.5%	28.7	-8.4%	37.4	28.2%	24.8	-2.0%
May	32.5	-11.5%	34.6	-16.6%	29.3	-4.2%	28.6	-0.2%	31.4	-15.8%	23.4	-5.6%
Jun	34.6	6.4%	46.1	33.1%	28.1	-4.1%	30.5	6.8%	39.0	24.1%	22.1	-5.6%
Jul	32.0	-7.4%	35.1	-23.9%	27.1	-3.6%	33.5	9.8%	35.0	-10.2%	21.1	-4.5%
Aug	36.4	13.8%	35.3	0.5%	25.9	-4.4%	26.9	-19.9%	29.0	-17.2%	19.9	-5.7%
Sep	40.0	10.0%	43.4	23.2%	24.3	-6.2%	35.6	32.7%	38.2	31.6%	18.4	-7.5%
Oct	33.9	-15.3%	44.6	2.7%	22.2	-8.6%	26.3	-26.1%	34.1	-10.8%	16.7	-9.2%
Nov	39.8	17.4%	33.0	-25.9%	20.6	-7.2%	34.0	28.9%	31.3	-8.2%	15.3	-8.4%
Dec	37.9	-5.0%	35.9	8.6%	18.6	-9.7%	31.9	-6.1%	33.9	8.6%	13.9	-9.2%
Total	423.3		458.4		334.7		366.1		398.5		263.1	

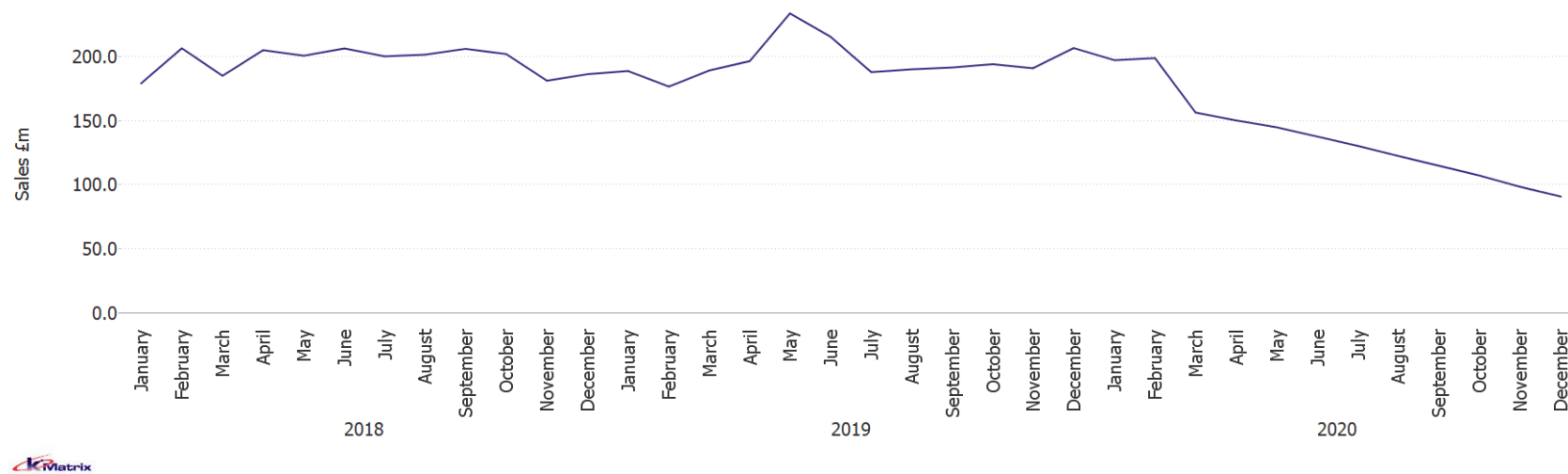
Greater Birmingham and Solihull LEP LCEGS Sales Comparing Consecutive Months – Level 1 Environmental, Level 2 Recovery & Recycling

	Recovery & Recycling					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	26.2	-	26.6	13.7%	22.6	-3.0%
Feb	22.2	-15.0%	25.3	-5.1%	27.6	22.1%
Mar	24.3	9.3%	23.2	-8.3%	23.1	-16.3%
Apr	26.4	8.5%	28.4	22.7%	22.4	-3.0%
May	24.6	-6.6%	26.9	-5.6%	21.4	-4.5%
Jun	26.5	7.7%	28.3	5.2%	20.4	-4.7%
Jul	26.1	-1.7%	27.7	-1.9%	19.7	-3.4%
Aug	23.9	-8.4%	23.6	-14.8%	18.7	-5.1%
Sep	24.9	4.0%	26.4	11.5%	17.7	-5.3%
Oct	22.7	-8.6%	29.5	11.9%	16.5	-6.8%
Nov	26.2	15.5%	23.4	-20.6%	14.9	-9.7%
Dec	23.4	-10.7%	23.3	-0.5%	13.2	-11.4%
Total	297.4		312.6		238.2	

Appendix E – Greater Lincolnshire LEP

Sector LCEGS Line Graphs – Sales, Companies and Employees

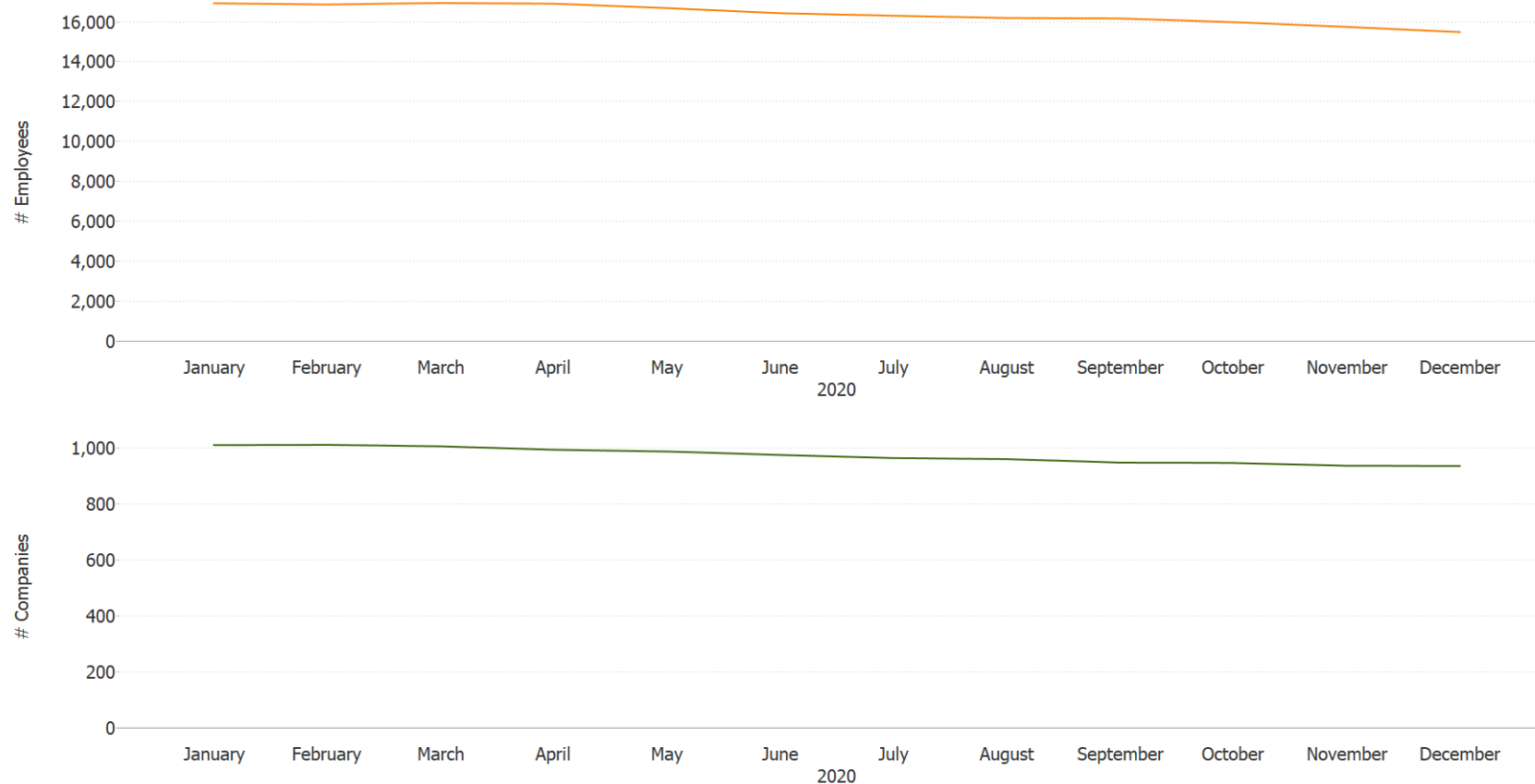
Greater Lincolnshire LEP LCEGS Sales by month from January 2018 through to October 2020



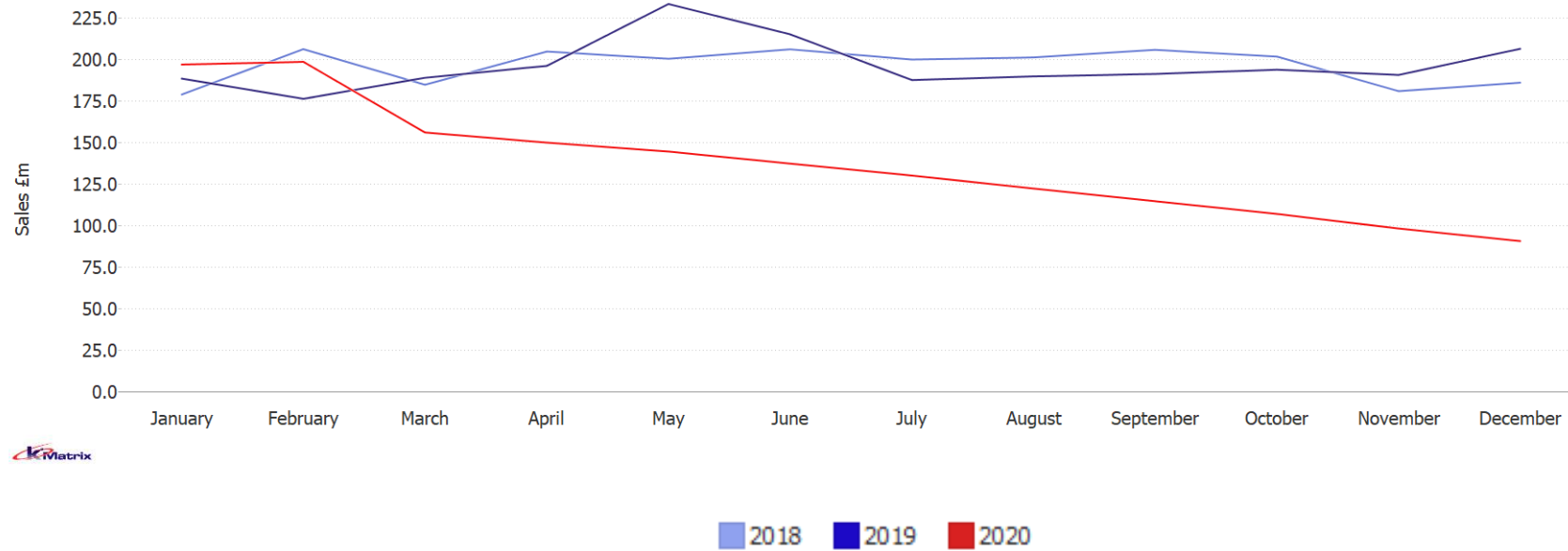
The variability of the sales value per month is normal and to be expected, what we can see is that a line of best fit would indicate overall growth in the sector between January 2018 and March 2020, followed by the contraction of the sector from March onwards.

Greater Lincolnshire LEP LCEGS Number of Employees and Companies by month from January 2020 through to October 2020

Monthly company and employee figures do fluctuate slightly month-to-month, in a normal year, however the continued decline from March onwards is not normal.

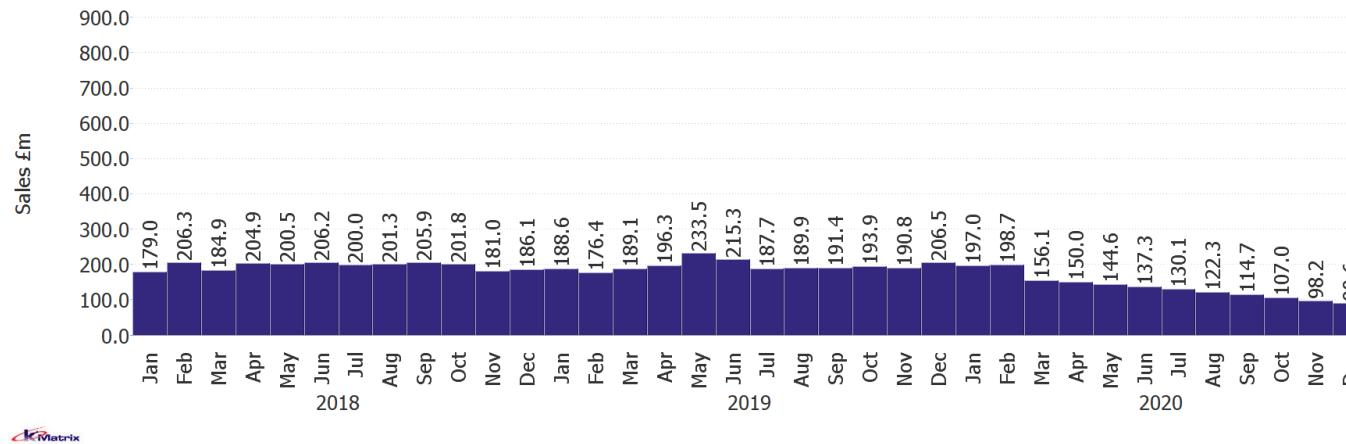


Greater Lincolnshire LEP LCEGS Sales by month, split by calendar year

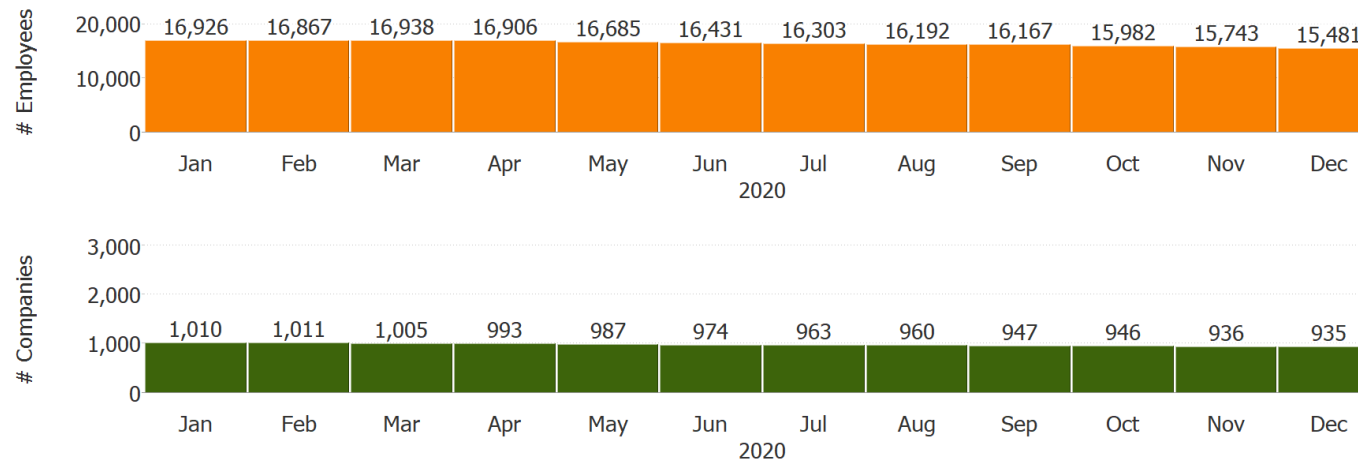


Sector LCEGS Histograms – Sales, Companies and Employees

Greater Lincolnshire LEP LCEGS Sales



Greater Lincolnshire LEP LCEGS Number of Employees and Companies



Sector, Level 1 & 2 LCEGS Data Tables – Sales

Sector

Greater Lincolnshire LEP LCEGS Comparing Growth in Consecutive Months – Sector Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	179.0	-	188.6	1.3%	197.0	-4.6%
February	206.3	15.3%	176.4	-6.5%	198.7	0.9%
March	184.9	-10.4%	189.1	7.2%	156.1	-21.4%
April	204.9	10.8%	196.3	3.8%	150.0	-3.9%
May	200.5	-2.1%	233.5	19.0%	144.6	-3.6%
June	206.2	2.8%	215.3	-7.8%	137.3	-5.0%
July	200.0	-3.0%	187.7	-12.8%	130.1	-5.2%
August	201.3	0.6%	189.9	1.2%	122.3	-6.0%
September	205.9	2.3%	191.4	0.8%	114.7	-6.2%
October	201.8	-2.0%	193.9	1.3%	107.0	-6.7%
November	181.0	-10.3%	190.8	-1.6%	98.2	-8.2%
December	186.1	2.8%	206.5	8.3%	90.6	-7.7%
Total	2,358.0		2,359.4		1,646.6	

Level 1

Greater Lincolnshire LEP LCEGS Comparing Growth in Consecutive Months – Low Carbon Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	69.3	-	75.3	6.8%	78.3	-2.2%
February	78.9	13.8%	64.4	-14.4%	73.9	-5.6%
March	71.5	-9.4%	77.0	19.6%	60.3	-18.4%
April	81.5	14.0%	77.0	0.0%	57.4	-4.8%
May	80.5	-1.2%	88.3	14.7%	55.6	-3.1%
June	82.8	2.9%	83.6	-5.4%	52.8	-5.0%
July	76.1	-8.1%	70.1	-16.1%	49.9	-5.5%
August	79.0	3.8%	72.2	3.1%	47.0	-5.8%
September	80.9	2.3%	72.3	0.1%	43.9	-6.6%
October	78.2	-3.3%	72.7	0.6%	41.0	-6.6%
November	69.1	-11.6%	69.0	-5.1%	37.5	-8.5%
December	70.5	1.9%	80.1	16.1%	34.9	-6.9%
Total	918.4		902.2		632.5	

Greater Lincolnshire LEP LCEGS Comparing Growth in Consecutive Months – Renewable Energy Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	71.6	-	71.3	-3.6%	77.5	-4.8%
February	81.0	13.1%	73.4	3.0%	79.5	2.6%
March	72.0	-11.0%	69.7	-5.0%	62.3	-21.6%
April	78.1	8.4%	74.3	6.6%	60.0	-3.7%
May	74.3	-4.8%	94.5	27.2%	57.8	-3.7%
June	77.9	4.8%	86.3	-8.7%	54.7	-5.4%
July	80.7	3.6%	76.6	-11.3%	52.0	-4.9%
August	77.6	-3.8%	76.7	0.1%	49.0	-5.8%
September	78.3	0.9%	76.8	0.1%	46.1	-5.9%
October	78.2	-0.1%	75.5	-1.6%	43.0	-6.7%
November	70.8	-9.5%	77.3	2.4%	39.7	-7.7%
December	74.0	4.5%	81.4	5.3%	36.5	-8.1%
Total	914.3		933.8		658.1	

Greater Lincolnshire LEP LCEGS Comparing Growth in Consecutive Months – Environmental Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	38.1	-	42.0	1.0%	41.3	-8.2%
February	46.5	22.0%	38.6	-8.1%	45.3	9.7%
March	41.4	-11.0%	42.4	9.7%	33.5	-26.0%
April	45.4	9.7%	44.9	6.1%	32.5	-3.0%
May	45.7	0.7%	50.7	12.8%	31.2	-4.0%
June	45.5	-0.4%	45.4	-10.5%	29.8	-4.5%
July	43.3	-5.0%	41.0	-9.6%	28.2	-5.4%
August	44.7	3.3%	41.0	0.0%	26.3	-6.7%
September	46.7	4.6%	42.3	3.1%	24.7	-6.1%
October	45.4	-2.8%	45.7	8.0%	23.0	-6.9%
November	41.1	-9.5%	44.4	-2.7%	20.9	-9.1%
December	41.6	1.3%	45.0	1.3%	19.2	-8.1%
Total	525.3		523.4		355.9	

Although there have been fluctuations in sales on a month-by-month basis prior to Covid-19, this is normal fluctuation. There has been a consistent drop in growth each month between April to December in 2020 in all three Level 1 sub-sectors, indicating a continued contraction of the market. For Renewable Energy and Environmental, the contraction is increasing with higher negative growth rates August-December than were seen April-June.

Level 2

Greater Lincolnshire LEP LCEGS Sales Comparing Consecutive Months – Level 1 Low Carbon, Level 2 Energy Management and Building Technologies

	Energy Management						Building Technologies					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	3.9	-	4.1	7.9%	4.3	4.9%	27.7	-	29.7	16.0%	31.3	2.3%
Feb	4.7	19.1%	3.9	-3.9%	3.7	-14.0%	30.2	9.0%	25.0	-16.0%	29.6	-5.4%
Mar	3.5	-25.7%	4.1	3.8%	3.1	-16.2%	27.1	-10.4%	31.3	25.4%	24.5	-17.2%
Apr	4.4	26.8%	4.2	3.7%	2.9	-6.5%	33.5	23.7%	26.9	-14.0%	23.8	-2.9%
May	4.1	-7.3%	4.3	1.4%	2.8	-3.4%	32.6	-2.6%	35.4	31.6%	23.1	-2.9%
Jun	4.0	-2.1%	4.1	-3.2%	2.7	-3.6%	33.1	1.5%	34.6	-2.4%	21.9	-5.2%
Jul	4.0	1.4%	3.9	-5.3%	2.5	-7.4%	29.9	-9.7%	26.8	-22.6%	20.9	-4.6%
Aug	4.4	9.9%	3.9	0.6%	2.4	-4.0%	30.6	2.3%	27.5	2.9%	19.9	-4.8%
Sep	4.1	-8.2%	4.1	3.5%	2.2	-8.3%	31.7	3.8%	27.0	-2.1%	18.5	-7.0%
Oct	4.2	3.2%	4.3	4.4%	2.1	-4.5%	32.4	2.1%	28.5	5.5%	17.4	-5.9%
Nov	3.9	-6.0%	4.0	-7.0%	1.9	-9.5%	25.8	-20.3%	27.1	-4.9%	16.0	-8.0%
Dec	3.8	-4.3%	4.1	3.7%	1.8	-5.3%	25.6	-0.9%	30.6	13.0%	15.0	-6.3%
Total	48.9		49.0		32.4		360.2		350.3		261.9	

Greater Lincolnshire LEP LCEGS Sales Comparing Consecutive Months – Level 1 Low Carbon, Level 2 Alternative Fuels and Alternative Fuel Vehicles

	Alternative fuels						Alternative Fuel Vehicle					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	25.7	-	28.4	1.8%	29.7	0.0%	9.9	-	10.9	0.9%	10.4	-20.0%
Feb	30.1	17.0%	23.8	-16.3%	26.9	-9.4%	11.3	15.0%	9.7	-11.4%	11.0	5.8%
Mar	27.5	-8.5%	28.7	20.9%	21.6	-19.7%	11.2	-1.0%	10.5	8.7%	9.1	-17.3%
Apr	29.3	6.5%	31.4	9.1%	20.3	-6.0%	11.7	4.3%	12.2	16.0%	8.5	-6.6%
May	30.9	5.5%	33.1	5.5%	19.5	-3.9%	10.3	-12.3%	12.6	3.5%	8.4	-1.2%
Jun	30.6	-0.9%	29.5	-10.9%	18.5	-5.1%	12.6	22.2%	12.5	-0.7%	8.0	-4.8%
Jul	28.6	-6.7%	27.3	-7.3%	17.4	-5.9%	11.0	-12.6%	9.6	-23.5%	7.5	-6.3%
Aug	29.7	3.9%	27.4	0.1%	16.3	-6.3%	11.8	7.1%	10.8	12.8%	6.9	-8.0%
Sep	31.1	4.6%	27.7	1.1%	15.1	-7.4%	11.4	-2.7%	11.3	5.0%	6.6	-4.3%
Oct	27.7	-10.7%	26.5	-4.3%	13.9	-7.9%	11.4	-0.3%	11.0	-3.2%	6.1	-7.6%
Nov	26.4	-4.8%	24.8	-6.4%	12.7	-8.6%	10.5	-7.6%	10.7	-2.8%	5.6	-8.2%
Dec	27.9	5.8%	29.7	19.8%	11.9	-6.3%	10.8	2.5%	13.0	21.4%	5.1	-8.9%
Total	345.4		338.3		223.8		134.0		134.7		93.2	

Greater Lincolnshire LEP LCEGS Sales Comparing Consecutive Months – Level 1 Renewable Energy, Level 2 Wind and Geothermal

	Wind						Geothermal					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	30.0	-	28.6	-10.9%	30.0	-15.7%	7.8	-	8.1	2.5%	9.3	8.1%
Feb	35.6	18.6%	31.4	9.8%	33.9	13.0%	8.2	5.8%	8.0	-1.4%	8.6	-7.5%
Mar	31.3	-12.1%	28.2	-10.3%	26.8	-20.9%	7.3	-11.1%	7.5	-6.7%	7.0	-18.6%
Apr	32.0	2.2%	31.7	12.5%	25.7	-4.1%	9.6	30.9%	7.9	5.5%	6.8	-2.9%
May	31.9	-0.2%	40.7	28.5%	24.8	-3.5%	8.1	-14.9%	9.9	25.0%	6.6	-2.9%
Jun	31.3	-2.0%	36.4	-10.6%	23.4	-5.6%	8.5	4.2%	9.3	-5.6%	6.2	-6.1%
Jul	34.7	11.0%	32.2	-11.5%	22.3	-4.7%	8.2	-3.4%	8.4	-9.6%	5.9	-4.8%
Aug	31.9	-8.2%	34.0	5.4%	21.3	-4.5%	8.3	0.8%	8.6	1.7%	5.5	-6.8%
Sep	31.9	0.2%	34.5	1.6%	19.9	-6.6%	8.3	0.0%	9.1	6.0%	5.2	-5.5%
Oct	35.6	11.4%	30.1	-12.8%	18.4	-7.5%	8.2	-0.7%	9.3	2.2%	4.9	-5.8%
Nov	30.8	-13.3%	32.0	6.3%	17.1	-7.1%	7.5	-8.5%	8.9	-4.0%	4.4	-10.2%
Dec	32.1	4.1%	35.6	11.3%	15.8	-7.6%	7.9	5.6%	8.6	-2.9%	4.1	-6.8%
Total	389.1		395.4		279.4		97.9		103.6		74.5	

Greater Lincolnshire LEP LCEGS Sales Comparing Consecutive Months – Level 1 Renewable Energy, Level 2 Photovoltaic and Biomass

	Photovoltaic						Biomass					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	19.5	-	19.0	6.1%	20.5	3.0%	12.9	-	14.0	-4.1%	16.2	3.8%
Feb	20.2	3.3%	20.4	7.7%	19.7	-3.9%	15.3	19.2%	12.1	-13.9%	15.8	-2.5%
Mar	19.5	-3.2%	18.3	-10.4%	16.0	-18.8%	12.5	-18.1%	14.2	17.7%	11.3	-28.5%
Apr	20.7	6.0%	18.3	0.2%	15.3	-4.4%	14.2	13.0%	14.8	4.2%	11.0	-2.7%
May	18.7	-9.6%	25.3	37.9%	14.7	-3.9%	14.0	-1.4%	16.9	13.9%	10.6	-3.6%
Jun	21.5	14.9%	22.4	-11.5%	14.0	-4.8%	15.1	7.7%	16.6	-1.6%	10.0	-5.7%
Jul	22.5	4.3%	19.5	-13.1%	13.4	-4.3%	13.6	-9.5%	14.9	-9.9%	9.5	-5.0%
Aug	21.1	-5.9%	18.3	-6.2%	12.4	-7.5%	14.8	8.4%	14.3	-4.4%	8.9	-6.3%
Sep	20.9	-1.1%	18.5	1.3%	11.8	-4.8%	15.7	6.1%	13.1	-8.6%	8.4	-5.6%
Oct	18.1	-13.5%	18.4	-0.2%	11.0	-6.8%	14.8	-5.3%	16.1	23.3%	7.9	-6.0%
Nov	17.5	-3.3%	19.2	4.2%	10.1	-8.2%	13.5	-9.1%	15.7	-2.4%	7.3	-7.6%
Dec	17.9	2.2%	19.9	3.6%	9.3	-7.9%	14.6	8.6%	15.6	-0.8%	6.6	-9.6%
Total	238.2		237.5		168.2		170.9		178.2		123.5	

Greater Lincolnshire LEP LCEGS Sales Comparing Consecutive Months – Level 1 Environmental, Level 2 Water and Waste Water and Waste Management

	Water and Waste Water						Waste Management					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	11.6	-	14.1	11.9%	13.4	-15.7%	13.2	-	12.4	-13.9%	13.2	-2.2%
Feb	15.7	34.7%	13.5	-4.2%	14.6	9.0%	14.1	7.4%	11.2	-9.8%	13.9	5.3%
Mar	14.1	-10.1%	13.3	-1.5%	12.0	-17.8%	13.0	-8.3%	13.4	19.8%	9.6	-30.9%
Apr	15.1	6.9%	14.7	10.9%	11.8	-1.7%	14.1	9.0%	14.4	7.1%	9.3	-3.1%
May	14.2	-5.4%	15.3	3.8%	11.3	-4.2%	14.5	2.4%	17.0	18.0%	8.8	-5.4%
Jun	14.5	1.5%	14.5	-5.4%	10.7	-5.3%	14.1	-2.9%	13.7	-19.4%	8.4	-4.5%
Jul	13.5	-6.8%	14.8	2.1%	10.1	-5.6%	13.2	-6.1%	12.4	-8.9%	8.0	-4.8%
Aug	15.5	15.1%	13.0	-11.9%	9.4	-6.9%	13.2	0.3%	13.1	5.2%	7.5	-6.3%
Sep	15.1	-2.4%	13.7	5.1%	8.9	-5.3%	15.0	13.6%	13.5	3.1%	7.0	-6.7%
Oct	15.5	2.3%	15.4	12.7%	8.4	-5.6%	13.3	-11.5%	13.8	1.9%	6.5	-7.1%
Nov	14.0	-10.0%	14.1	-8.4%	7.5	-10.7%	13.2	-0.9%	14.1	2.7%	5.9	-9.2%
Dec	12.6	-9.4%	15.9	12.3%	6.9	-8.0%	14.4	9.0%	13.5	-4.6%	5.4	-8.5%
Total	171.4		172.2		125.0		165.3		162.4		103.5	

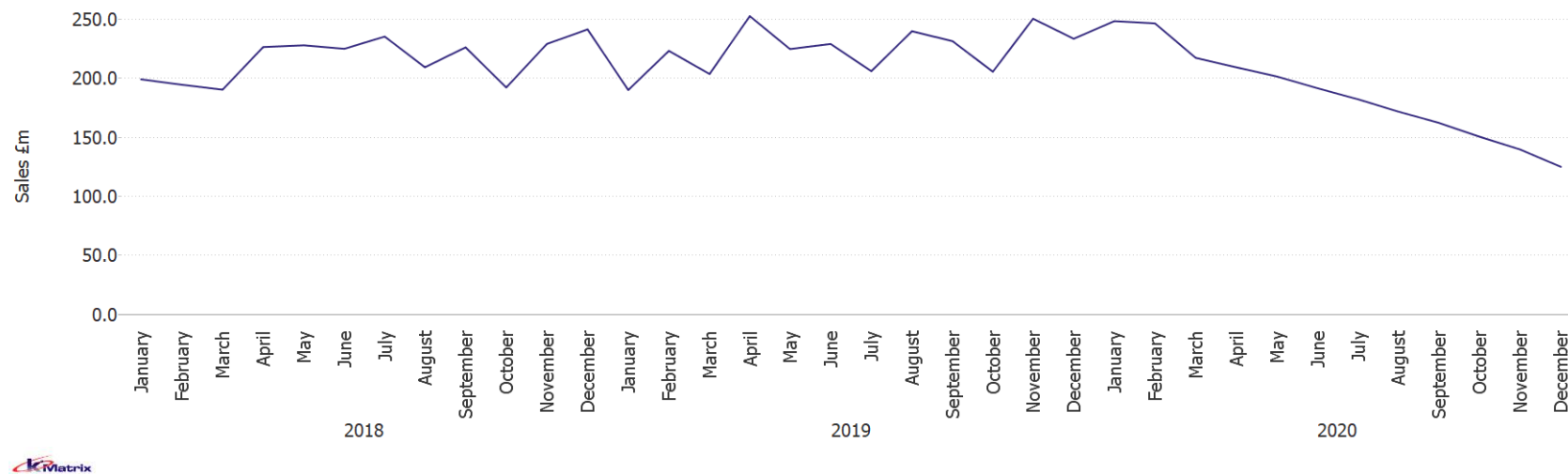
Greater Lincolnshire LEP LCEGS Sales Comparing Consecutive Months – Level 1 Environmental, Level 2 Recovery & Recycling

	Recovery & Recycling					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	9.1	-	11.4	10.7%	10.0	-8.3%
Feb	11.9	30.3%	9.8	-13.7%	12.1	21.0%
Mar	10.2	-14.4%	11.2	14.5%	8.1	-33.1%
Apr	11.3	11.5%	11.1	-1.2%	7.8	-3.7%
May	12.2	7.3%	13.3	19.8%	7.6	-2.6%
Jun	12.1	-0.4%	12.4	-6.7%	7.3	-3.9%
Jul	12.0	-1.2%	9.5	-23.2%	6.9	-5.5%
Aug	11.1	-7.3%	10.2	7.7%	6.4	-7.2%
Sep	11.8	6.0%	10.5	2.4%	6.0	-6.3%
Oct	11.8	0.5%	11.6	10.3%	5.6	-6.7%
Nov	9.8	-17.5%	11.5	-0.8%	5.1	-8.9%
Dec	10.3	5.4%	10.9	-5.3%	4.7	-7.8%
Total	133.6		133.2		87.6	

Appendix F – Leicester and Leicestershire LEP

Sector LCEGS Line Graphs – Sales, Companies and Employees

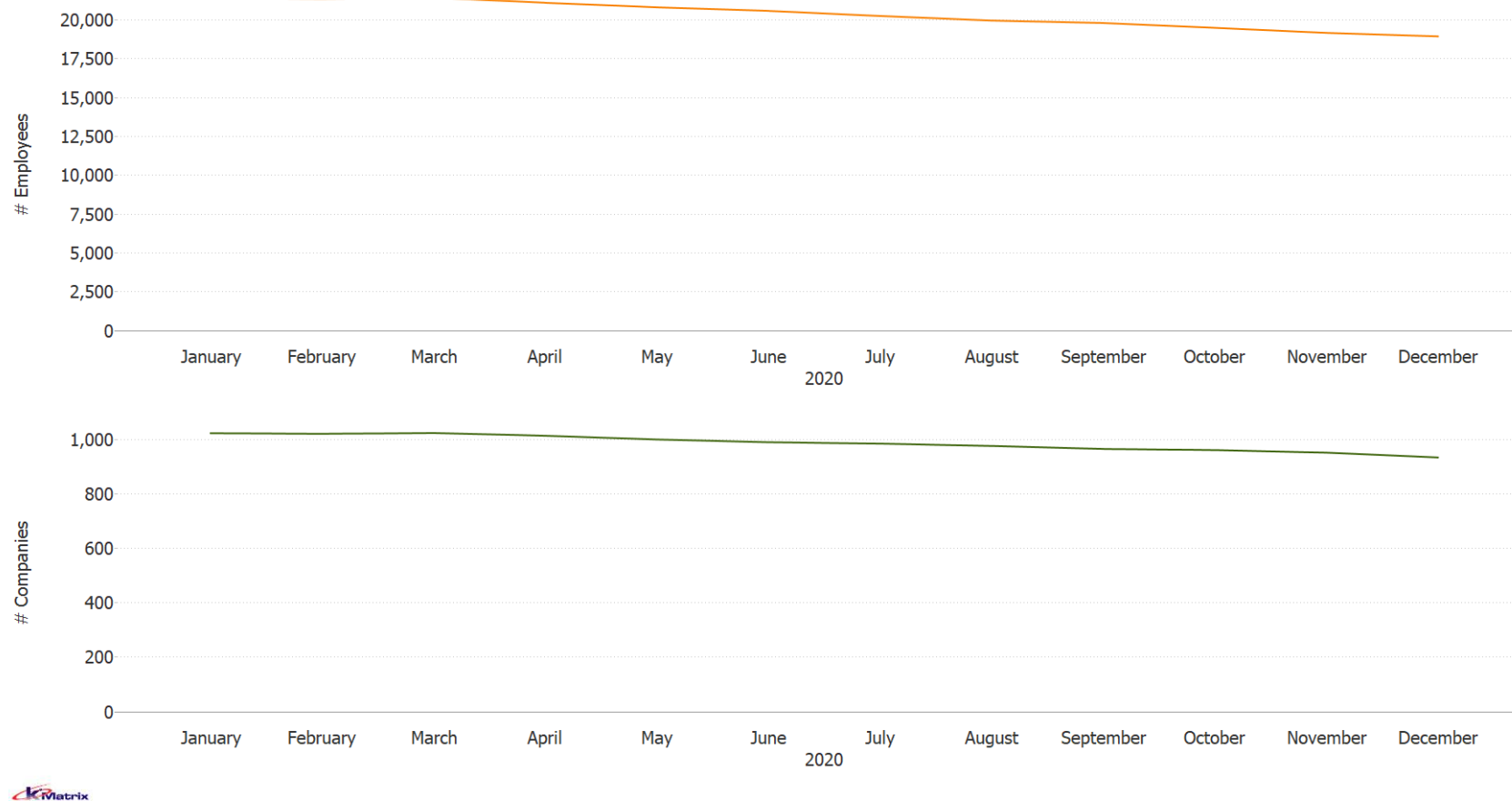
Leicester and Leicestershire LEP LCEGS Sales by month from January 2018 through to December 2020



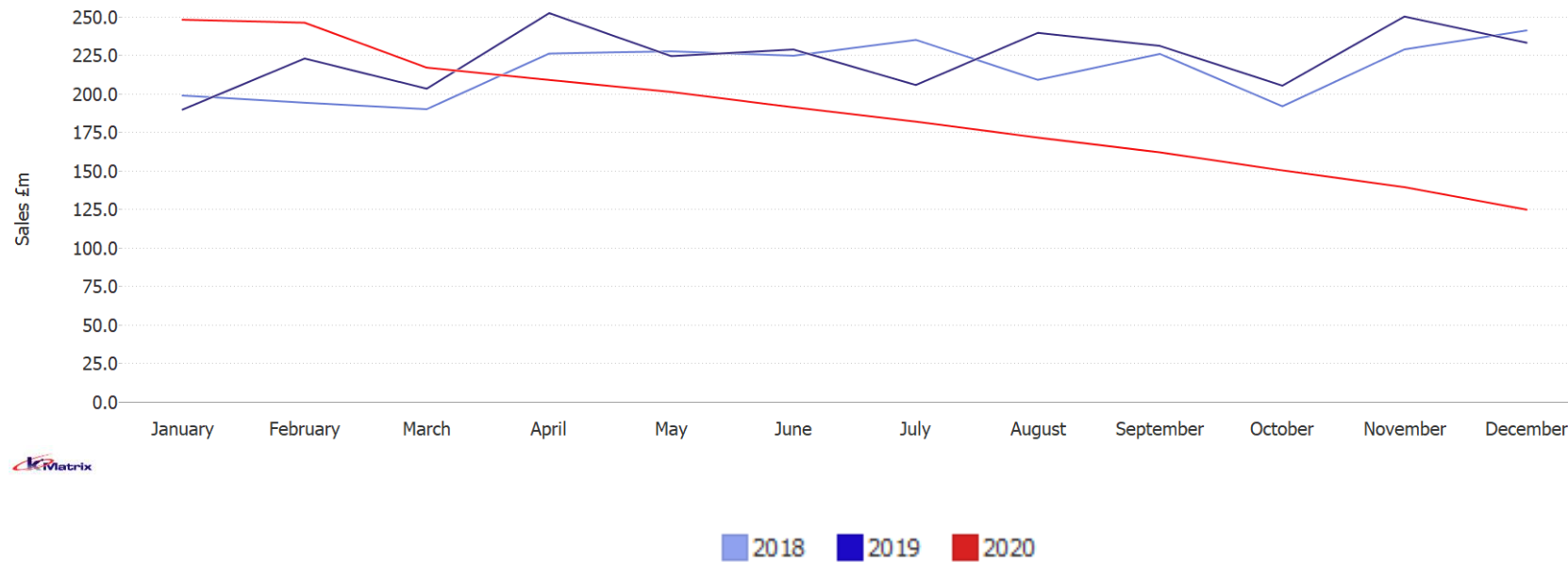
The variability of the sales value per month is normal and to be expected, what we can see is that a line of best fit would indicate overall growth in the sector between January 2018 and March 2020, followed by the contraction of the sector from March onwards.

Leicester and Leicestershire LEP LCEGS Number of Employees and Companies by month from January 2020 through to December 2020

Monthly company and employee figures do fluctuate slightly month-to-month, in a normal year, however the continued decline from March onwards is not normal.

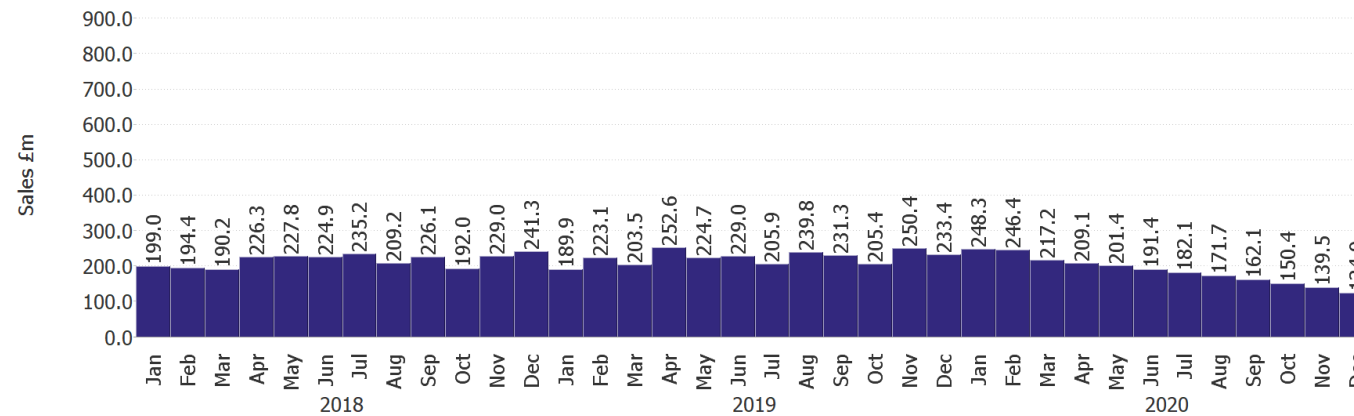


Leicester and Leicestershire LEP LCEGS Sales by month, split by calendar year

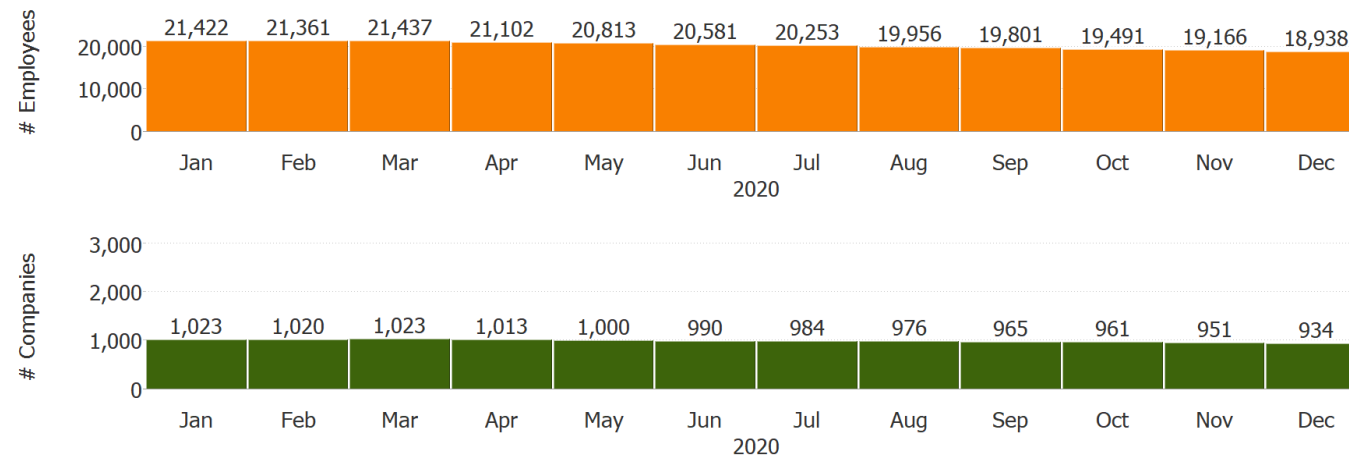


Sector LCEGS Histograms – Sales, Companies and Employees

Leicester and Leicestershire LEP LCEGS Sales



Leicester and Leicestershire LEP LCEGS Number of Employees and Companies



Sector, Level 1 & 2 LCEGS Data Tables – Sales

Sector

Leicester and Leicestershire LEP LCEGS Comparing Growth in Consecutive Months – Sector Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	199.0	-	189.9	-21.3%	248.3	6.4%
February	194.4	-2.3%	223.1	17.5%	246.4	-0.8%
March	190.2	-2.2%	203.5	-8.8%	217.2	-11.9%
April	226.3	19.0%	252.6	24.1%	209.1	-3.7%
May	227.8	0.7%	224.7	-11.1%	201.4	-3.7%
June	224.9	-1.3%	229.0	1.9%	191.4	-5.0%
July	235.2	4.6%	205.9	-10.1%	182.1	-4.9%
August	209.2	-11.1%	239.8	16.5%	171.7	-5.7%
September	226.1	8.1%	231.3	-3.5%	162.1	-5.6%
October	192.0	-15.1%	205.4	-11.2%	150.4	-7.2%
November	229.0	19.3%	250.4	21.9%	139.5	-7.2%
December	241.3	5.4%	233.4	-6.8%	124.9	-10.5%
Total	2,595.4		2,688.8		2,244.5	

Level 1

Leicester and Leicestershire LEP LCEGS Comparing Growth in Consecutive Months – Low Carbon Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	73.9	-	70.4	-20.2%	94.8	12.5%
February	68.4	-7.4%	81.7	16.0%	91.8	-3.2%
March	72.5	6.1%	77.5	-5.2%	82.9	-9.7%
April	88.2	21.6%	96.5	24.6%	79.6	-4.0%
May	83.0	-5.9%	82.5	-14.5%	76.9	-3.4%
June	83.6	0.7%	87.7	6.3%	72.8	-5.3%
July	88.6	6.0%	77.1	-12.1%	69.2	-4.9%
August	76.9	-13.2%	90.2	17.0%	65.3	-5.6%
September	82.7	7.5%	86.6	-4.1%	61.4	-6.0%
October	70.3	-15.1%	77.9	-10.0%	56.7	-7.7%
November	81.3	15.7%	91.7	17.7%	52.7	-7.1%
December	88.2	8.5%	84.3	-8.0%	46.7	-11.4%
Total	957.7		1,004.1		850.8	

Leicester and Leicestershire LEP LCEGS Comparing Growth in Consecutive Months – Renewable Energy Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	82.8	-	75.2	-24.7%	97.3	4.4%
February	81.5	-1.7%	92.8	23.4%	101.9	4.7%
March	75.4	-7.4%	79.1	-14.8%	86.6	-15.0%
April	89.5	18.7%	99.8	26.3%	83.5	-3.6%
May	94.2	5.3%	92.8	-7.0%	80.5	-3.6%
June	90.3	-4.2%	90.5	-2.5%	76.7	-4.7%
July	92.6	2.6%	81.5	-9.9%	73.1	-4.7%
August	84.0	-9.3%	95.0	16.6%	68.8	-5.9%
September	96.5	14.8%	92.4	-2.7%	65.4	-4.9%
October	76.8	-20.4%	80.3	-13.2%	60.8	-7.0%
November	97.4	26.9%	102.6	27.8%	56.4	-7.2%
December	99.9	2.5%	93.2	-9.1%	50.9	-9.8%
Total	1,060.9		1,075.1		901.9	

Leicester and Leicestershire LEP LCEGS Comparing Growth in Consecutive Months – Environmental Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	42.3	-	44.3	-16.7%	56.2	0.7%
February	44.5	5.2%	48.6	9.8%	52.6	-6.4%
March	42.2	-5.2%	47.0	-3.4%	47.7	-9.3%
April	48.6	15.1%	56.3	19.8%	46.0	-3.6%
May	50.6	4.1%	49.3	-12.3%	44.0	-4.3%
June	51.0	0.9%	50.8	2.9%	41.9	-4.8%
July	53.9	5.7%	47.3	-6.9%	39.8	-5.0%
August	48.3	-10.5%	54.6	15.4%	37.7	-5.3%
September	46.9	-2.9%	52.3	-4.2%	35.3	-6.4%
October	45.0	-4.0%	47.3	-9.6%	32.9	-6.8%
November	50.3	11.7%	56.1	18.7%	30.4	-7.6%
December	53.2	5.7%	55.8	-0.5%	27.2	-10.5%
Total	576.8		609.7		490.7	

Although there have been fluctuations in sales on a month-by-month basis prior to Covid-19, this is normal fluctuation. There has been a consistent drop in growth each month between April to December in 2020 in all three Level 1 sub-sectors, indicating a continued contraction of the market. For Environmental, the contraction is increasing with higher negative growth rates August-December than were seen April-June.

Level 2

Leicester and Leicestershire LEP LCEGS Sales Comparing Consecutive Months – Level 1 Low Carbon, Level 2 Energy Management and Building Technologies

	Energy Management						Building Technologies					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	4.4	-	4.2	-16.0%	6.0	17.6%	26.9	-	27.3	-11.1%	37.9	8.9%
Feb	4.2	-5.3%	5.1	21.8%	5.9	-1.7%	25.8	-3.9%	28.7	5.0%	35.4	-6.6%
Mar	4.5	7.1%	4.4	-13.1%	5.2	-11.9%	28.4	9.9%	30.9	7.8%	32.2	-9.0%
Apr	4.7	6.3%	5.8	31.0%	5.0	-3.8%	35.0	23.5%	36.0	16.4%	31.0	-3.7%
May	4.9	4.2%	4.7	-19.0%	4.8	-4.0%	30.0	-14.3%	31.5	-12.5%	29.7	-4.2%
Jun	5.2	5.3%	4.5	-4.0%	4.7	-2.1%	34.7	15.5%	32.4	2.8%	28.6	-3.7%
Jul	4.8	-7.6%	5.2	13.8%	4.5	-4.3%	34.4	-0.9%	28.3	-12.6%	27.0	-5.6%
Aug	5.0	3.6%	5.4	4.3%	4.2	-6.7%	31.2	-9.1%	34.4	21.2%	25.5	-5.6%
Sep	5.4	9.2%	5.0	-7.9%	4.0	-4.8%	31.1	-0.4%	34.3	0.0%	23.8	-6.7%
Oct	4.1	-24.0%	4.8	-3.0%	3.7	-7.5%	26.4	-15.0%	28.2	-17.8%	22.2	-6.7%
Nov	5.1	23.3%	5.2	8.4%	3.4	-8.1%	31.9	20.7%	34.0	20.3%	20.2	-9.0%
Dec	5.0	-2.0%	5.1	-1.8%	3.0	-11.8%	30.7	-3.7%	34.8	2.5%	18.3	-9.4%
Total	57.3		59.4		54.4		366.3		381.0		331.8	

Leicester and Leicestershire LEP LCEGS Sales Comparing Consecutive Months – Level 1 Low Carbon, Level 2 Alternative Fuels and Alternative Fuel Vehicles

	Alternative fuels						Alternative Fuel Vehicle					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	28.1	-	26.2	-26.4%	33.4	12.1%	11.9	-	10.2	-27.1%	14.7	22.5%
Feb	25.4	-9.5%	32.0	21.8%	34.0	1.8%	10.5	-12.4%	13.0	27.8%	13.6	-7.5%
Mar	25.7	0.9%	29.4	-8.1%	30.8	-9.4%	11.7	11.7%	10.0	-23.1%	12.0	-11.8%
Apr	34.4	34.3%	36.3	23.5%	29.6	-3.9%	11.4	-2.0%	15.1	50.9%	11.5	-4.2%
May	33.4	-3.2%	32.1	-11.6%	28.9	-2.4%	12.0	5.0%	11.4	-24.4%	11.1	-3.5%
Jun	28.5	-14.5%	35.5	10.7%	26.9	-6.9%	12.4	3.4%	12.4	8.7%	10.3	-7.2%
Jul	33.9	18.9%	29.5	-17.0%	25.6	-4.8%	12.7	2.1%	11.4	-8.6%	9.9	-3.9%
Aug	26.6	-21.7%	35.3	19.7%	24.2	-5.5%	11.6	-8.1%	12.3	8.4%	9.3	-6.1%
Sep	29.9	12.7%	31.6	-10.6%	22.9	-5.4%	13.5	16.1%	13.0	5.2%	8.7	-6.5%
Oct	26.8	-10.6%	30.6	-3.3%	20.9	-8.7%	10.6	-21.6%	11.7	-9.5%	8.2	-5.7%
Nov	29.2	9.2%	36.5	19.4%	19.9	-4.8%	12.2	15.0%	13.0	11.2%	7.6	-7.3%
Dec	35.6	21.7%	29.8	-18.4%	17.4	-12.6%	14.0	14.8%	12.0	-8.3%	6.6	-13.2%
Total	357.4		384.8		314.5		144.6		145.6		123.5	

Leicester and Leicestershire LEP LCEGS Sales Comparing Consecutive Months – Level 1 Renewable Energy, Level 2 Wind and Geothermal

	Wind						Geothermal					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	35.0	-	31.5	-23.3%	38.7	-5.1%	9.4	-	9.1	-17.3%	10.0	2.0%
Feb	35.5	1.4%	40.5	28.5%	44.5	15.0%	9.3	-0.5%	10.2	12.2%	11.5	15.0%
Mar	32.0	-9.8%	32.5	-19.8%	35.5	-20.2%	7.7	-17.0%	8.9	-12.7%	9.8	-14.8%
Apr	39.0	21.6%	43.5	34.1%	34.3	-3.4%	9.4	21.7%	10.5	17.6%	9.3	-5.1%
May	41.2	5.7%	41.7	-4.2%	32.9	-4.1%	9.4	0.3%	10.1	-4.1%	9.2	-1.1%
Jun	38.5	-6.4%	35.8	-14.3%	31.5	-4.3%	9.0	-4.3%	9.7	-3.3%	8.7	-5.4%
Jul	37.9	-1.7%	32.8	-8.2%	29.8	-5.4%	10.3	14.3%	9.2	-5.5%	8.3	-4.6%
Aug	36.1	-4.5%	38.8	18.1%	28.1	-5.7%	8.2	-20.1%	10.1	9.7%	7.8	-6.0%
Sep	41.7	15.3%	36.1	-6.8%	26.6	-5.3%	9.2	11.7%	10.5	3.8%	7.4	-5.1%
Oct	33.8	-18.9%	33.1	-8.5%	24.6	-7.5%	8.1	-11.6%	9.3	-10.9%	6.8	-8.1%
Nov	41.9	23.8%	41.8	26.4%	23.0	-6.5%	9.7	19.1%	12.0	28.9%	6.4	-5.9%
Dec	41.0	-2.1%	40.8	-2.4%	20.6	-10.4%	11.0	13.5%	9.8	-18.6%	5.8	-9.4%
Total	453.6		448.7		370.1		111.0		119.5		101.0	

Leicester and Leicestershire LEP LCEGS Sales Comparing Consecutive Months – Level 1 Renewable Energy, Level 2 Photovoltaic and Biomass

	Photovoltaic						Biomass					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	20.6	-	19.1	-30.3%	26.1	8.8%	16.3	-	13.9	-25.3%	20.6	23.4%
Feb	18.9	-8.1%	25.1	31.7%	23.9	-8.4%	16.1	-1.4%	15.4	10.6%	20.1	-2.4%
Mar	19.3	2.0%	21.8	-13.3%	23.6	-1.3%	14.9	-7.6%	14.3	-7.3%	16.1	-19.9%
Apr	22.3	15.3%	26.1	19.9%	22.8	-3.4%	17.0	14.1%	17.6	23.4%	15.5	-3.7%
May	25.6	14.9%	23.0	-11.9%	21.9	-3.9%	16.3	-4.1%	16.2	-8.0%	15.0	-3.2%
Jun	23.8	-6.9%	26.3	14.4%	20.8	-5.0%	17.2	5.5%	16.9	3.9%	14.2	-5.3%
Jul	24.7	3.7%	20.9	-20.7%	19.9	-4.3%	17.8	3.6%	16.9	0.4%	13.7	-3.5%
Aug	22.3	-9.6%	24.7	18.5%	18.6	-6.5%	15.7	-12.0%	19.5	15.0%	12.9	-5.8%
Sep	25.8	15.6%	25.6	3.4%	17.8	-4.3%	18.1	15.5%	18.6	-4.3%	12.4	-3.9%
Oct	19.3	-25.5%	20.5	-19.9%	16.7	-6.2%	13.9	-23.2%	15.9	-14.7%	11.5	-7.3%
Nov	25.9	34.2%	28.7	40.1%	15.5	-7.2%	18.3	31.4%	18.2	14.5%	10.5	-8.7%
Dec	27.4	6.2%	24.0	-16.2%	14.2	-8.4%	18.6	2.0%	16.7	-8.1%	9.4	-10.5%
Total	276.0		285.9		241.8		200.1		200.2		171.9	

Leicester and Leicestershire LEP LCEGS Sales Comparing Consecutive Months – Level 1 Environmental, Level 2 Water and Waste Water and Waste Management

	Water and Waste Water						Waste Management					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	14.0	-	15.4	-14.4%	18.1	-4.7%	13.3	-	12.9	-21.3%	17.6	3.5%
Feb	14.5	3.4%	17.9	16.1%	18.1	0.0%	14.3	7.4%	14.8	14.9%	15.4	-12.5%
Mar	13.6	-6.4%	16.2	-9.1%	15.6	-13.8%	13.4	-6.2%	14.2	-4.2%	14.3	-7.1%
Apr	16.5	21.2%	20.2	24.3%	15.1	-3.2%	14.2	5.7%	16.3	15.3%	13.6	-4.9%
May	17.6	7.1%	16.0	-20.8%	14.4	-4.6%	15.9	12.0%	15.4	-5.4%	13.1	-3.7%
Jun	17.4	-1.1%	16.6	4.1%	13.7	-4.9%	15.7	-0.9%	16.1	4.2%	12.6	-3.8%
Jul	18.5	6.2%	16.8	0.8%	12.9	-5.8%	15.6	-0.9%	13.2	-17.6%	12.1	-4.0%
Aug	16.4	-11.4%	17.2	2.5%	12.3	-4.7%	14.7	-5.7%	17.6	33.2%	11.2	-7.4%
Sep	16.2	-1.2%	18.5	7.7%	11.5	-6.5%	14.4	-2.1%	16.6	-6.1%	10.6	-5.4%
Oct	14.5	-10.4%	16.1	-12.9%	10.7	-7.0%	14.9	3.4%	14.3	-13.7%	9.9	-6.6%
Nov	16.2	11.7%	17.6	9.0%	10.0	-6.5%	16.0	7.5%	18.8	31.8%	9.1	-8.1%
Dec	18.0	11.2%	19.0	8.0%	9.0	-10.0%	16.4	2.5%	17.0	-10.0%	8.0	-12.1%
Total	193.4		207.6		161.4		178.5		187.2		147.5	

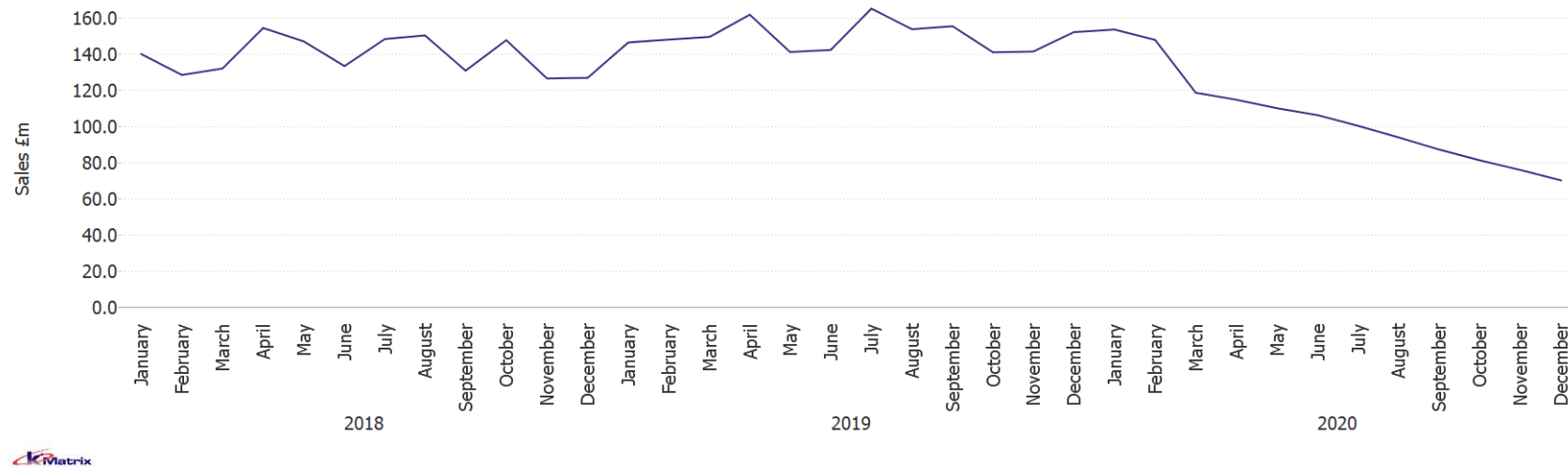
Leicester and Leicestershire LEP LCEGS Sales Comparing Consecutive Months – Level 1 Environmental, Level 2 Recovery & Recycling

	Recovery & Recycling					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	10.5	-	11.6	-13.4%	14.8	3.5%
Feb	11.2	6.1%	11.2	-3.1%	13.7	-7.4%
Mar	10.9	-2.9%	11.8	5.5%	12.6	-8.0%
Apr	12.9	18.5%	14.1	19.0%	12.2	-3.2%
May	12.0	-6.5%	12.8	-9.0%	11.6	-4.9%
Jun	12.5	4.1%	12.6	-2.0%	11.0	-5.2%
Jul	14.3	13.8%	12.5	-0.3%	10.5	-4.5%
Aug	12.6	-11.7%	14.0	12.0%	10.0	-4.8%
Sep	11.3	-10.2%	12.2	-12.7%	9.4	-6.0%
Oct	11.1	-2.0%	12.2	-0.7%	8.7	-7.4%
Nov	12.6	14.1%	13.9	14.8%	8.1	-6.9%
Dec	13.4	6.3%	14.3	2.9%	7.3	-9.9%
Total	145.3		153.3		129.9	

Appendix G – Marches LEP

Sector LCEGS Line Graphs – Sales, Companies and Employees

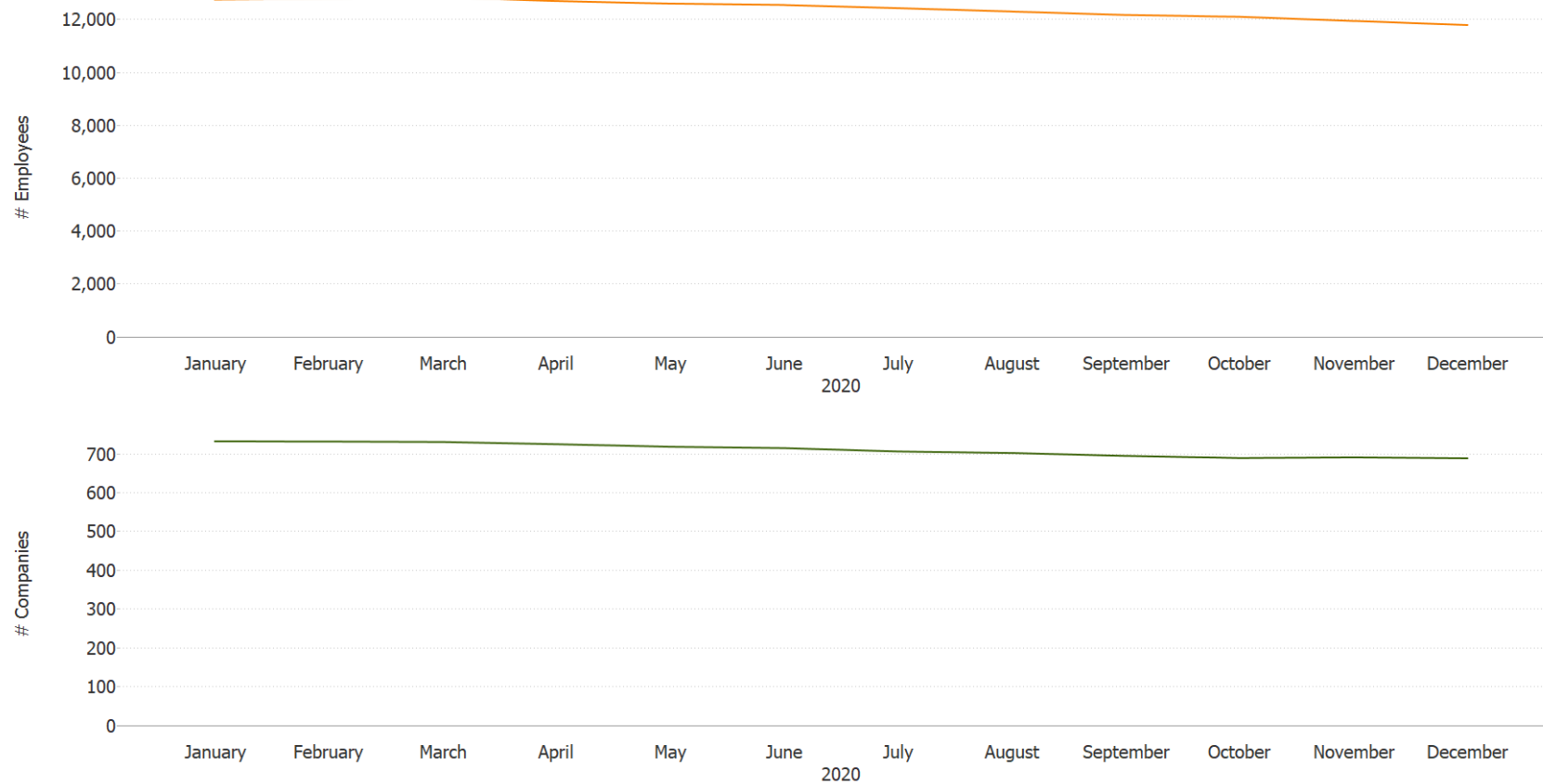
Marches LEP LCEGS Sales by month from January 2018 through to December 2020



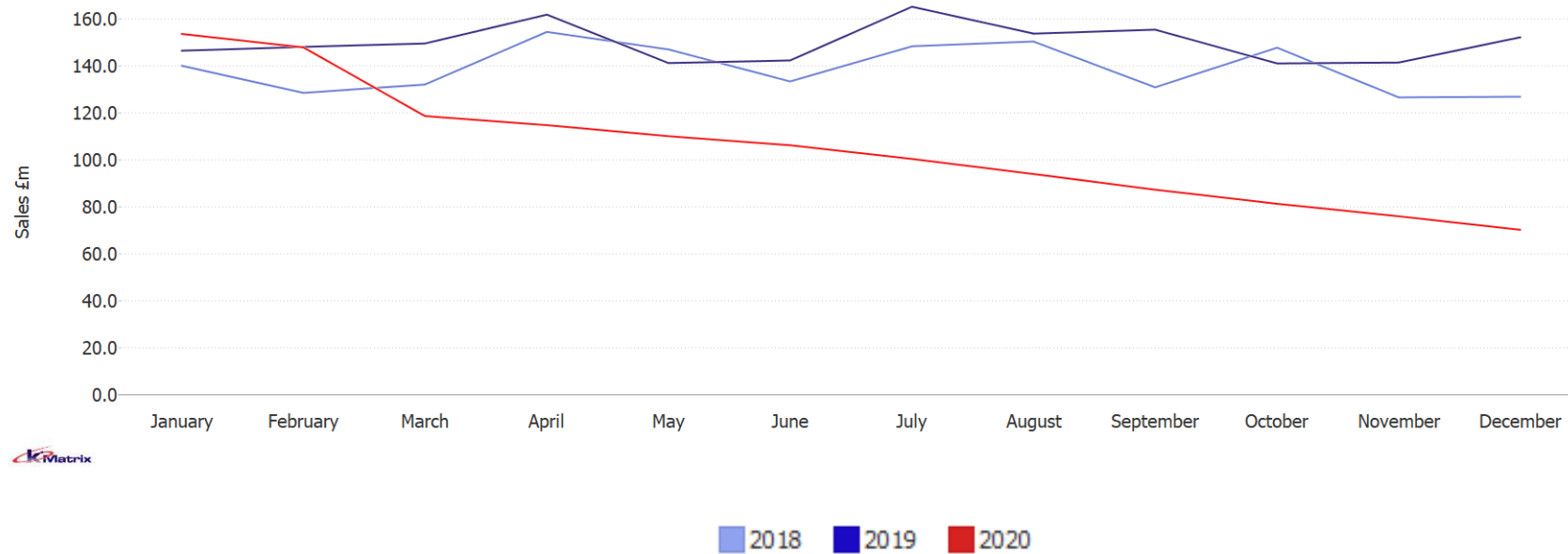
The variability of the sales value per month is normal and to be expected, what we can see is that a line of best fit would indicate overall growth in the sector between January 2018 and March 2020, followed by the contraction of the sector from March onwards.

Marches LEP LCEGS Number of Employees and Companies by month from January 2020 through to December 2020

Monthly company and employee figures do fluctuate slightly month-to-month, in a normal year, however the continued decline from March onwards is not normal.

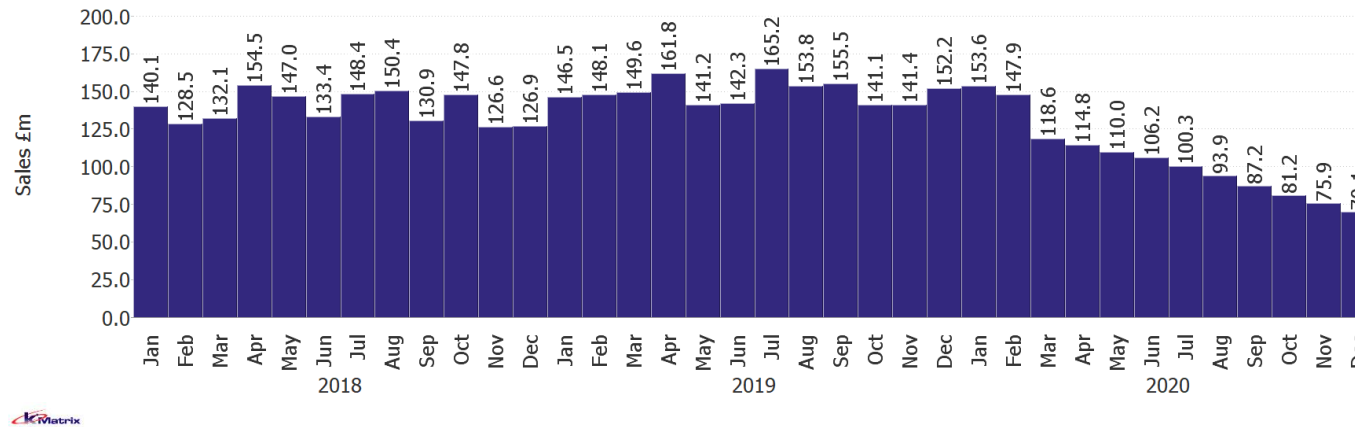


Marches LEP LCEGS Sales by month, split by calendar year

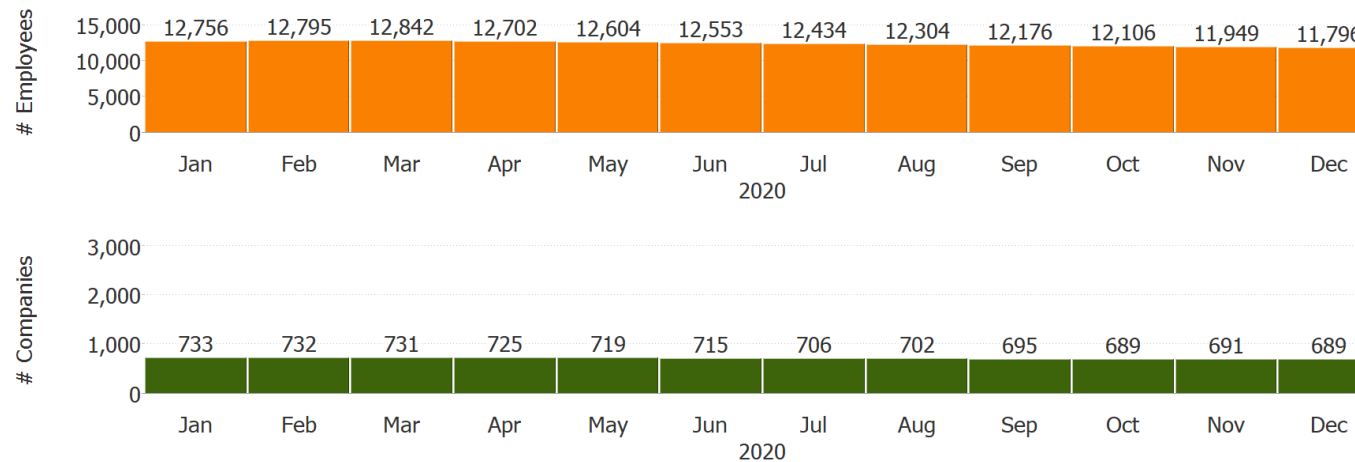


Sector LCEGS Histograms – Sales, Companies and Employees

Marches LEP LCEGS Sales



Marches LEP LCEGS Number of Employees and Companies



Sector, Level 1 & 2 LCEGS Data Tables – Sales

Sector

Marches LEP LCEGS Comparing Growth in Consecutive Months – Sector Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	140.1	-	146.5	15.4%	153.6	0.9%
February	128.5	-8.3%	148.1	1.1%	147.9	-3.7%
March	132.1	2.8%	149.6	1.0%	118.6	-19.8%
April	154.5	17.0%	161.8	8.2%	114.8	-3.2%
May	147.0	-4.8%	141.2	-12.8%	110.0	-4.2%
June	133.4	-9.3%	142.3	0.8%	106.2	-3.5%
July	148.4	11.2%	165.2	16.1%	100.3	-5.6%
August	150.4	1.4%	153.8	-6.9%	93.9	-6.4%
September	130.9	-13.0%	155.5	1.1%	87.2	-7.1%
October	147.8	12.9%	141.1	-9.3%	81.2	-6.9%
November	126.6	-14.3%	141.4	0.3%	75.9	-6.5%
December	126.9	0.2%	152.2	7.6%	70.1	-7.6%
Total	1,666.4		1,798.7		1,259.7	

Level 1

Marches LEP LCEGS Comparing Growth in Consecutive Months – Low Carbon Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	54.2	-	56.4	13.9%	59.6	0.8%
February	50.3	-7.3%	61.4	8.9%	58.6	-1.7%
March	52.0	3.3%	56.7	-7.6%	46.6	-20.5%
April	61.4	18.0%	66.4	17.1%	45.6	-2.1%
May	58.1	-5.4%	52.4	-21.1%	43.4	-4.8%
June	49.6	-14.5%	55.4	5.6%	42.2	-2.8%
July	57.7	16.3%	64.7	16.8%	39.8	-5.7%
August	58.7	1.8%	59.2	-8.5%	37.4	-6.0%
September	53.7	-8.6%	58.9	-0.5%	34.5	-7.8%
October	57.9	7.7%	56.1	-4.7%	32.0	-7.2%
November	50.6	-12.6%	53.2	-5.1%	29.8	-6.9%
December	49.5	-2.0%	59.1	11.1%	27.8	-6.7%
Total	653.7		699.9		497.3	

Marches LEP LCEGS Comparing Growth in Consecutive Months – Renewable Energy Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	57.0	-	59.3	21.8%	61.4	-0.6%
February	50.8	-10.9%	55.3	-6.8%	56.8	-7.5%
March	51.8	2.1%	61.0	10.5%	46.4	-18.3%
April	59.4	14.5%	59.1	-3.1%	44.3	-4.5%
May	57.3	-3.4%	59.5	0.6%	42.7	-3.6%
June	54.2	-5.5%	56.9	-4.3%	40.9	-4.2%
July	60.6	11.8%	66.3	16.4%	38.8	-5.1%
August	59.7	-1.4%	62.9	-5.2%	36.1	-7.0%
September	49.0	-17.9%	62.8	-0.1%	33.8	-6.4%
October	57.2	16.6%	55.3	-11.9%	31.6	-6.5%
November	49.4	-13.6%	56.5	2.0%	29.5	-6.6%
December	48.7	-1.5%	61.8	9.4%	27.2	-7.8%
Total	655.1		716.7		489.5	

Marches LEP LCEGS Comparing Growth in Consecutive Months – Environmental Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	28.8	-	30.8	7.3%	32.6	4.2%
February	27.4	-4.9%	31.4	2.0%	32.6	0.0%
March	28.2	3.0%	31.8	1.0%	25.6	-21.5%
April	33.8	19.6%	36.3	14.2%	24.8	-3.1%
May	31.6	-6.3%	29.3	-19.4%	23.9	-3.6%
June	29.5	-6.6%	30.0	2.6%	23.1	-3.3%
July	30.0	1.7%	34.3	14.2%	21.8	-5.6%
August	31.9	6.3%	31.7	-7.4%	20.5	-6.0%
September	28.1	-12.0%	33.8	6.5%	19.0	-7.3%
October	32.7	16.4%	29.6	-12.3%	17.6	-7.4%
November	26.6	-18.6%	31.8	7.1%	16.6	-5.7%
December	28.7	7.6%	31.3	-1.4%	15.2	-8.4%
Total	357.6		382.1		273.3	

Although there have been fluctuations in sales on a month-by-month basis prior to Covid-19, this is normal fluctuation. There has been a consistent drop in growth each month between April to December in 2020 in all three Level 1 sub-sectors, indicating a continued contraction of the market. For Environmental, the contraction is increasing with higher negative growth rates August-December than were seen April-June.

Level 2

Marches LEP LCEGS Sales Comparing Consecutive Months – Level 1 Low Carbon, Level 2 Energy Management and Building Technologies

	Energy Management						Building Technologies					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	2.8	-	3.0	15.4%	3.2	0.0%	21.7	-	22.5	11.4%	25.3	14.5%
Feb	2.5	-13.2%	3.2	6.1%	3.5	9.4%	19.1	-12.1%	24.7	9.5%	23.1	-8.7%
Mar	3.0	20.5%	3.4	7.0%	2.5	-28.6%	21.7	13.3%	23.4	-5.2%	18.1	-21.6%
Apr	3.5	17.2%	3.6	7.3%	2.4	-4.0%	26.2	21.0%	25.7	9.8%	17.5	-3.3%
May	2.9	-16.2%	3.0	-17.5%	2.3	-4.2%	24.5	-6.5%	20.8	-18.9%	16.7	-4.6%
Jun	2.6	-10.3%	3.1	3.5%	2.2	-4.3%	20.0	-18.3%	22.9	10.1%	16.2	-3.0%
Jul	3.2	22.4%	3.7	18.0%	2.1	-4.5%	22.3	11.5%	24.3	5.7%	15.2	-6.2%
Aug	3.2	1.3%	3.0	-17.9%	2.0	-4.8%	23.8	6.5%	24.5	1.0%	14.4	-5.3%
Sep	3.0	-6.8%	3.2	6.9%	1.8	-10.0%	22.2	-6.6%	24.0	-2.2%	13.4	-6.9%
Oct	3.3	10.8%	3.2	0.2%	1.7	-5.6%	22.5	1.2%	23.5	-2.1%	12.4	-7.5%
Nov	2.6	-21.5%	2.8	-14.3%	1.6	-5.9%	20.7	-7.9%	21.2	-9.7%	11.4	-8.1%
Dec	2.6	-0.3%	3.2	14.2%	1.4	-12.5%	20.2	-2.3%	22.1	4.4%	10.6	-7.0%
Total	35.3		38.3		26.7		264.9		279.7		194.3	

Marches LEP LCEGS Sales Comparing Consecutive Months – Level 1 Low Carbon, Level 2 Alternative Fuels and Alternative Fuel Vehicles

	Alternative fuels						Alternative Fuel Vehicle					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	20.8	-	21.8	17.8%	21.0	-13.2%	7.4	-	7.4	10.4%	8.4	6.3%
Feb	20.3	-2.3%	23.1	6.0%	22.6	7.6%	6.9	-6.4%	8.7	18.5%	7.5	-10.7%
Mar	18.8	-7.8%	20.6	-10.8%	18.5	-18.1%	7.1	1.7%	7.5	-14.7%	6.1	-18.7%
Apr	21.2	13.0%	26.5	28.8%	18.4	-0.5%	8.7	23.3%	8.5	13.5%	6.0	-1.6%
May	20.7	-2.2%	18.8	-29.0%	17.3	-6.0%	8.0	-7.5%	8.1	-4.1%	5.7	-5.0%
Jun	18.1	-12.6%	19.9	6.0%	17.1	-1.2%	7.4	-7.9%	7.7	-5.7%	5.5	-3.5%
Jul	23.3	28.5%	25.4	27.6%	16.2	-5.3%	7.2	-2.2%	9.3	21.3%	5.1	-7.3%
Aug	22.0	-5.3%	20.6	-19.1%	15.2	-6.2%	7.9	9.5%	9.1	-2.2%	4.8	-5.9%
Sep	20.3	-8.1%	21.1	2.6%	13.9	-8.6%	6.8	-14.6%	8.7	-3.9%	4.3	-10.4%
Oct	22.4	10.7%	20.4	-3.5%	13.1	-5.8%	7.8	15.0%	7.3	-15.9%	4.0	-7.0%
Nov	19.8	-12.0%	20.2	-0.8%	12.2	-6.9%	6.1	-21.9%	7.2	-1.6%	3.7	-7.5%
Dec	18.5	-6.5%	24.2	19.5%	11.6	-4.9%	6.7	9.7%	7.9	8.7%	3.4	-8.1%
Total	246.2		262.7		197.1		88.1		97.3		64.5	

Marches LEP LCEGS Sales Comparing Consecutive Months – Level 1 Renewable Energy, Level 2 Wind and Geothermal

	Wind						Geothermal					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	23.4	-	23.8	24.6%	26.3	6.0%	6.2	-	6.6	29.4%	5.9	-15.7%
Feb	18.8	-19.9%	21.2	-10.6%	22.8	-13.3%	5.8	-5.5%	5.5	-15.9%	7.0	18.6%
Mar	20.0	6.6%	24.8	16.7%	19.0	-16.7%	5.5	-5.4%	6.4	16.3%	5.4	-22.9%
Apr	23.0	14.8%	23.4	-5.4%	17.9	-5.8%	6.7	21.4%	7.4	14.8%	5.2	-3.7%
May	22.7	-1.2%	24.1	2.8%	17.4	-2.8%	6.4	-3.8%	6.5	-12.4%	5.0	-3.8%
Jun	22.9	1.2%	24.5	1.7%	16.8	-3.4%	6.1	-5.5%	6.0	-7.1%	4.8	-4.0%
Jul	25.0	9.1%	27.1	10.5%	16.0	-4.8%	6.2	2.3%	6.4	6.9%	4.5	-6.3%
Aug	23.1	-7.8%	26.4	-2.3%	14.9	-6.9%	6.5	4.8%	6.9	7.7%	4.2	-6.7%
Sep	20.3	-12.1%	26.5	0.1%	14.1	-5.4%	5.8	-11.6%	6.3	-8.1%	3.9	-7.1%
Oct	24.3	19.8%	24.0	-9.3%	13.3	-5.7%	5.9	3.1%	5.8	-8.8%	3.6	-7.7%
Nov	18.6	-23.5%	24.5	2.1%	12.5	-6.0%	5.6	-5.7%	5.9	1.6%	3.3	-8.3%
Dec	19.1	2.8%	24.8	1.3%	11.6	-7.2%	5.1	-8.2%	7.0	19.4%	3.1	-6.1%
Total	261.2		295.0		202.6		71.8		76.6		55.9	

Marches LEP LCEGS Sales Comparing Consecutive Months – Level 1 Renewable Energy, Level 2 Photovoltaic and Biomass

	Photovoltaic						Biomass					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	15.6	-	16.0	13.5%	17.1	7.5%	10.7	-	11.8	26.9%	10.9	-14.8%
Feb	14.5	-7.2%	16.3	2.0%	14.6	-14.6%	10.6	-0.9%	11.1	-5.7%	11.2	2.8%
Mar	14.7	1.3%	16.4	0.5%	12.7	-13.0%	10.6	-0.8%	12.3	10.4%	8.5	-24.1%
Apr	15.7	6.6%	15.6	-4.5%	12.3	-3.1%	12.9	22.5%	11.5	-6.2%	8.1	-4.7%
May	15.9	1.3%	16.1	3.2%	11.8	-4.1%	11.1	-13.8%	11.8	2.7%	7.7	-4.9%
Jun	14.6	-7.8%	15.6	-3.5%	11.3	-4.2%	9.5	-14.7%	9.8	-16.7%	7.3	-5.2%
Jul	17.0	16.4%	19.0	21.9%	10.7	-5.3%	11.1	16.4%	12.5	26.8%	6.8	-6.8%
Aug	17.2	0.8%	15.9	-16.2%	9.9	-7.5%	11.9	7.1%	12.4	-0.9%	6.4	-5.9%
Sep	12.9	-25.1%	16.1	1.5%	9.2	-7.1%	9.1	-23.6%	12.7	2.5%	6.0	-6.3%
Oct	14.6	13.2%	13.4	-17.1%	8.5	-7.6%	11.2	23.8%	11.2	-12.0%	5.6	-6.7%
Nov	14.3	-1.6%	14.8	10.8%	7.9	-7.1%	9.8	-12.3%	10.1	-9.4%	5.2	-7.1%
Dec	14.1	-1.4%	15.9	7.1%	7.2	-8.9%	9.3	-5.8%	12.8	26.7%	4.8	-7.7%
Total	181.1		191.0		133.2		127.9		139.9		88.5	

Marches LEP LCEGS Sales Comparing Consecutive Months – Level 1 Environmental, Level 2 Water and Waste Water and Waste Management

	Water and Waste Water						Waste Management					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	10.2	-	11.4	10.7%	10.5	-0.9%	8.7	-	8.6	1.2%	10.6	14.0%
Feb	9.0	-11.9%	10.8	-5.3%	10.6	1.0%	7.9	-8.7%	9.3	8.2%	9.9	-6.6%
Mar	9.2	1.7%	10.6	-1.8%	9.4	-11.3%	9.1	14.3%	10.1	9.1%	7.6	-23.2%
Apr	12.1	32.1%	12.7	20.1%	9.1	-3.2%	9.4	3.1%	10.1	0.0%	7.3	-3.9%
May	10.5	-13.2%	10.1	-20.6%	8.9	-2.2%	8.6	-8.1%	8.3	-17.8%	7.1	-2.7%
Jun	10.5	-0.1%	10.9	7.7%	8.5	-4.5%	8.5	-1.5%	8.2	-1.6%	6.9	-2.8%
Jul	10.0	-5.3%	11.7	7.6%	8.1	-4.7%	8.8	4.2%	10.7	30.0%	6.6	-4.3%
Aug	10.7	7.5%	10.7	-8.4%	7.5	-7.4%	10.1	14.4%	9.9	-7.7%	6.2	-6.1%
Sep	10.0	-6.5%	12.1	12.7%	7.0	-6.7%	8.6	-15.1%	9.8	-0.8%	5.8	-6.5%
Oct	10.8	7.8%	9.7	-19.5%	6.5	-7.1%	9.7	13.0%	8.8	-9.8%	5.4	-6.9%
Nov	9.0	-16.5%	11.5	18.2%	6.1	-6.2%	7.6	-21.2%	9.6	8.5%	5.1	-5.6%
Dec	10.3	14.0%	10.6	-8.0%	5.6	-8.2%	8.5	11.0%	9.3	-2.4%	4.7	-7.8%
Total	122.3		132.9		97.8		105.3		112.8		83.2	

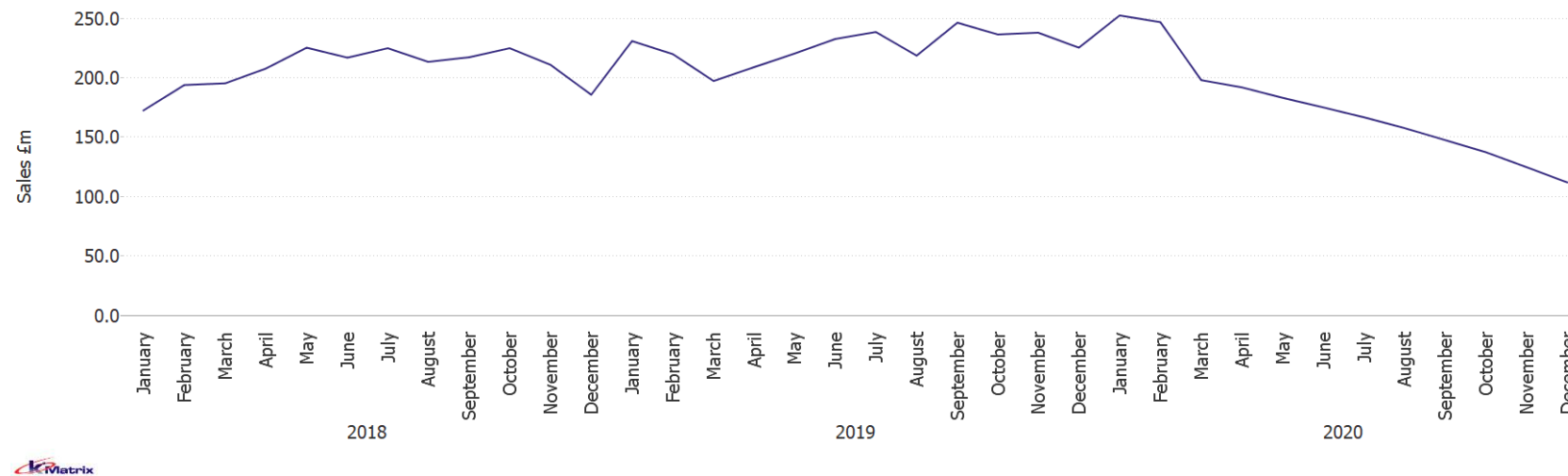
Marches LEP LCEGS Sales Comparing Consecutive Months – Level 1 Environmental, Level 2 Recovery & Recycling

	Recovery & Recycling					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	6.9	-	7.6	7.0%	8.1	2.5%
Feb	7.6	10.5%	8.0	5.8%	8.4	3.7%
Mar	6.9	-9.1%	7.5	-5.5%	6.1	-27.4%
Apr	9.0	29.7%	9.8	29.5%	5.8	-4.9%
May	8.9	-0.7%	7.6	-22.5%	5.6	-3.4%
Jun	7.5	-16.2%	7.7	2.0%	5.4	-3.6%
Jul	7.9	6.1%	8.3	7.1%	5.0	-7.4%
Aug	7.9	-0.2%	7.8	-5.4%	4.8	-4.0%
Sep	6.6	-16.5%	8.5	8.8%	4.4	-8.3%
Oct	8.8	33.3%	8.1	-5.0%	4.0	-9.1%
Nov	7.2	-18.5%	7.4	-8.7%	3.8	-5.0%
Dec	7.1	-1.8%	7.9	6.4%	3.4	-10.5%
Total	92.4		96.1		64.8	

Appendix H – Stoke and Staffordshire LEP

Sector LCEGS Line Graphs – Sales, Companies and Employees

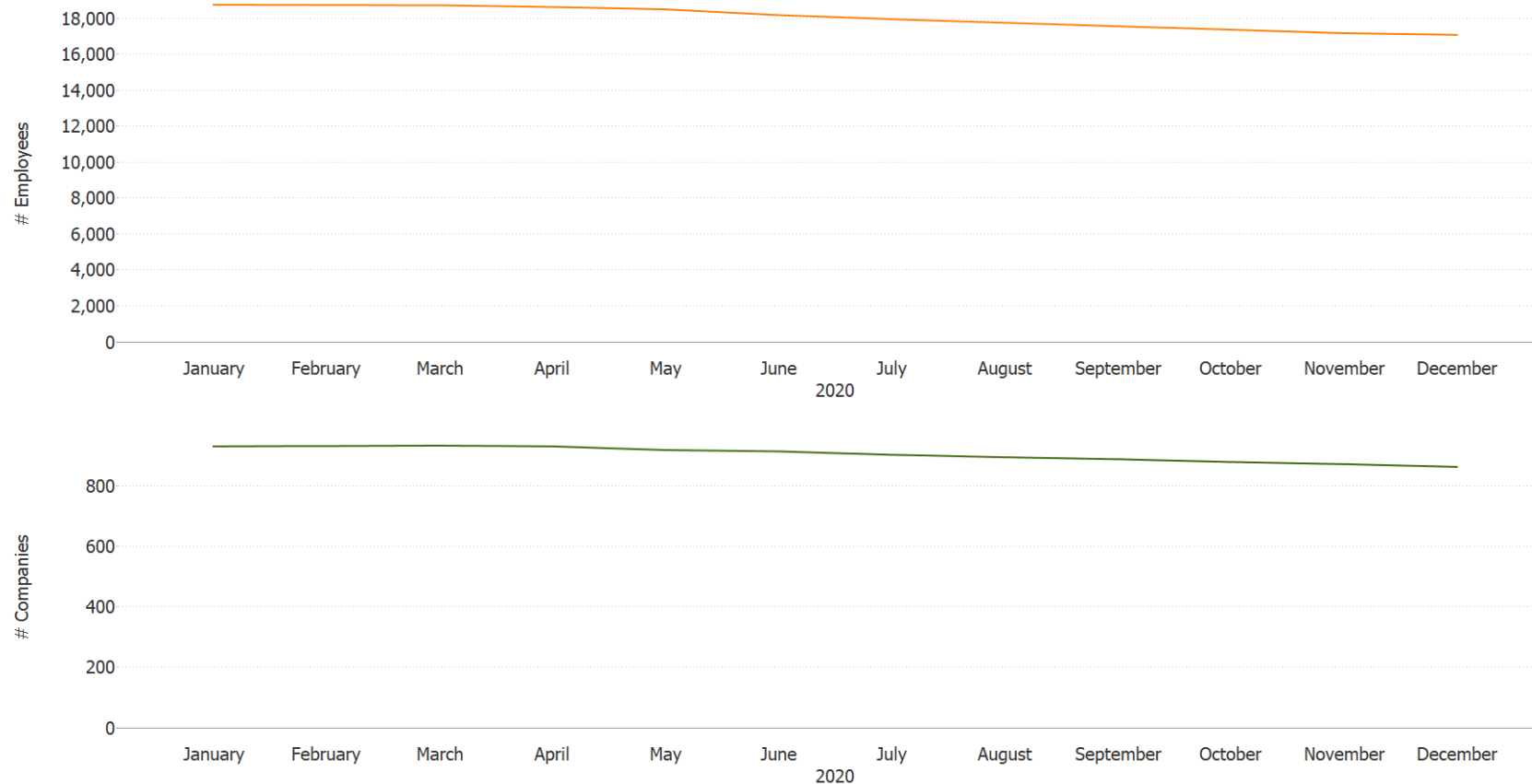
Stoke and Staffordshire LEP LCEGS Sales by month from January 2018 through to December 2020



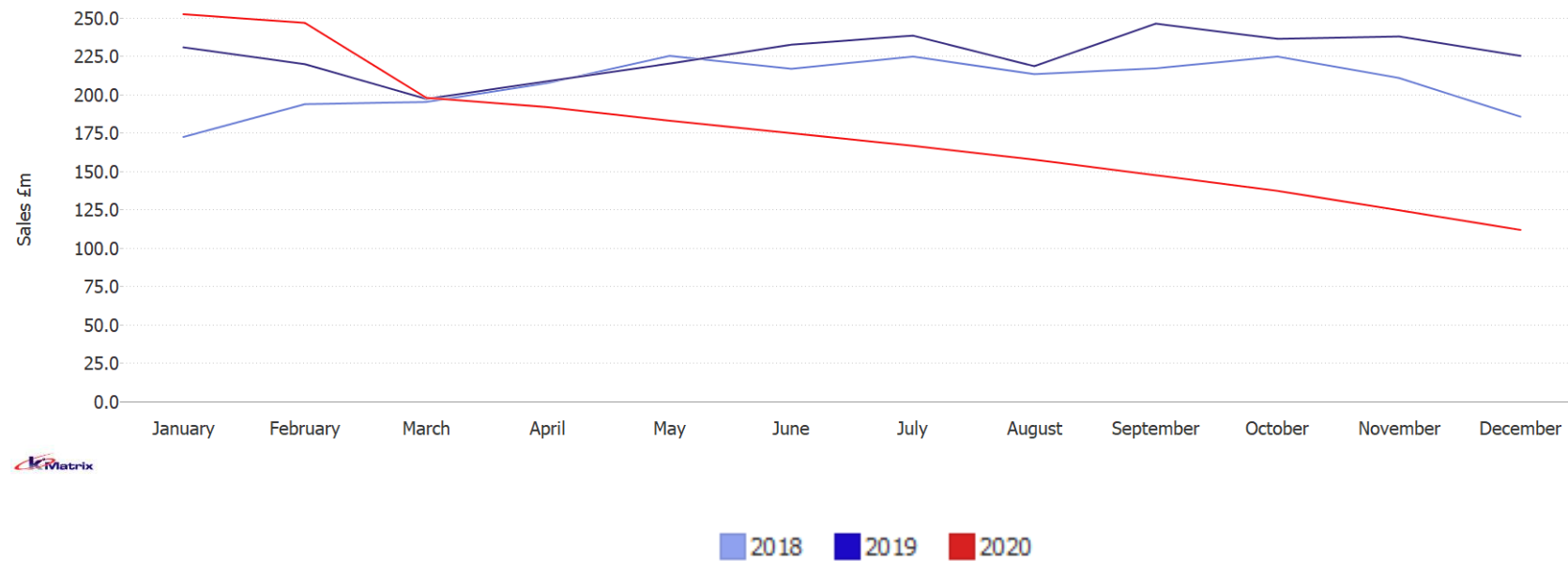
The variability of the sales value per month is normal and to be expected, what we can see is that a line of best fit would indicate overall growth in the sector between January 2018 and March 2020, followed by the contraction of the sector from March onwards.

Stoke and Staffordshire LEP LCEGS Number of Employees and Companies by month from January 2020 through to December 2020

Monthly company and employee figures do fluctuate slightly month-to-month, in a normal year, however the continued decline from March onwards is not normal.

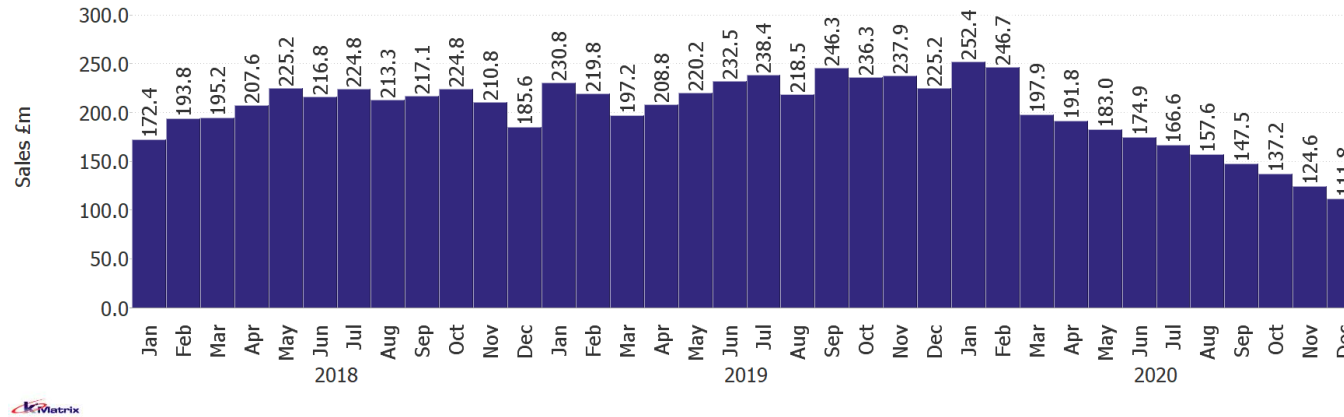


Stoke and Staffordshire LEP LCEGS Sales by month, split by calendar year

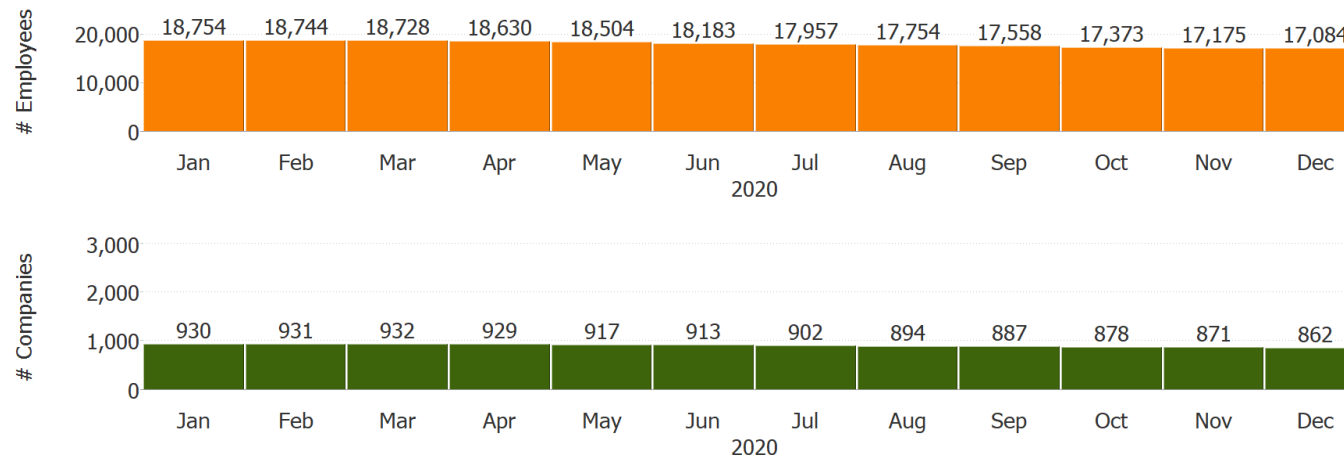


Sector LCEGS Histograms – Sales, Companies and Employees

Stoke and Staffordshire LEP LCEGS Sales



Stoke and Staffordshire LEP LCEGS Number of Employees and Companies



Sector, Level 1 & 2 LCEGS Data Tables – Sales

Sector

Stoke and Staffordshire LEP LCEGS Comparing Growth in Consecutive Months – Sector Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	172.4	-	230.8	24.4%	252.4	12.1%
February	193.8	12.4%	219.8	-4.8%	246.7	-2.3%
March	195.2	0.7%	197.2	-10.3%	197.9	-19.8%
April	207.6	6.4%	208.8	5.9%	191.8	-3.1%
May	225.2	8.5%	220.2	5.5%	183.0	-4.6%
June	216.8	-3.7%	232.5	5.6%	174.9	-4.4%
July	224.8	3.7%	238.4	2.6%	166.6	-4.7%
August	213.3	-5.1%	218.5	-8.4%	157.6	-5.4%
September	217.1	1.8%	246.3	12.7%	147.5	-6.4%
October	224.8	3.5%	236.3	-4.0%	137.2	-7.0%
November	210.8	-6.2%	237.9	0.6%	124.6	-9.2%
December	185.6	-12.0%	225.2	-5.3%	111.8	-10.3%
Total	2,487.3		2,711.8		2,092.0	

Level 1

Stoke and Staffordshire LEP LCEGS Comparing Growth in Consecutive Months – Low Carbon Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	65.9	-	88.4	19.5%	97.4	15.0%
February	73.3	11.2%	82.0	-7.2%	94.1	-3.4%
March	74.3	1.4%	73.6	-10.3%	77.7	-17.4%
April	78.8	5.9%	81.0	10.1%	75.6	-2.7%
May	84.1	6.8%	84.0	3.6%	71.7	-5.2%
June	84.1	-0.1%	90.1	7.3%	68.7	-4.2%
July	88.5	5.3%	87.2	-3.2%	64.6	-6.0%
August	81.3	-8.2%	86.8	-0.5%	61.6	-4.6%
September	82.7	1.7%	93.8	8.0%	57.8	-6.2%
October	85.5	3.4%	92.1	-1.8%	54.4	-5.9%
November	83.3	-2.5%	90.4	-1.8%	49.2	-9.6%
December	74.0	-11.2%	84.7	-6.4%	43.9	-10.8%
Total	955.9		1,034.2		816.7	

Stoke and Staffordshire LEP LCEGS Comparing Growth in Consecutive Months – Renewable Energy Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	68.5	-	94.1	32.0%	101.9	15.7%
February	76.2	11.2%	88.9	-5.5%	99.1	-2.7%
March	79.0	3.6%	78.3	-12.0%	77.4	-21.9%
April	84.1	6.5%	83.3	6.4%	74.7	-3.5%
May	90.0	7.0%	88.3	6.0%	71.6	-4.1%
June	85.6	-4.9%	93.2	5.6%	68.4	-4.5%
July	88.5	3.3%	98.4	5.6%	65.7	-3.9%
August	87.3	-1.4%	81.3	-17.4%	61.7	-6.1%
September	87.0	-0.3%	99.9	22.9%	57.8	-6.3%
October	88.2	1.4%	92.3	-7.6%	53.3	-7.8%
November	82.9	-6.0%	93.0	0.7%	48.3	-9.4%
December	71.3	-14.1%	88.1	-5.3%	43.5	-9.9%
Total	988.7		1,079.1		823.4	

Stoke and Staffordshire LEP LCEGS Comparing Growth in Consecutive Months – Environmental Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	37.9	-	48.2	19.6%	53.1	1.1%
February	44.2	16.6%	48.8	1.3%	53.5	0.8%
March	41.9	-5.3%	45.3	-7.2%	42.8	-20.0%
April	44.7	6.8%	44.5	-1.9%	41.5	-3.0%
May	51.0	14.1%	47.9	7.8%	39.7	-4.3%
June	47.1	-7.6%	49.2	2.6%	37.8	-4.8%
July	47.8	1.4%	52.7	7.2%	36.2	-4.2%
August	44.8	-6.3%	50.4	-4.5%	34.3	-5.2%
September	47.4	6.0%	52.5	4.3%	31.9	-7.0%
October	51.0	7.6%	51.9	-1.1%	29.5	-7.5%
November	44.6	-12.7%	54.5	4.9%	27.1	-8.1%
December	40.3	-9.5%	52.5	-3.7%	24.4	-10.0%
Total	542.8		598.5		451.8	

Although there have been fluctuations in sales on a month-by-month basis prior to Covid-19, this is normal fluctuation. There has been a consistent drop in growth each month between April to December in 2020 in all three Level 1 sub-sectors, indicating a continued contraction of the market. For Environmental, the contraction is increasing with higher negative growth rates August-December than were seen April-June.

Level 2

Stoke and Staffordshire LEP LCEGS Sales Comparing Consecutive Months – Level 1 Low Carbon, Level 2 Energy Management and Building Technologies

	Energy Management						Building Technologies					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	3.7	-	5.3	35.9%	5.4	25.6%	25.9	-	36.5	31.3%	41.8	17.7%
Feb	4.0	8.9%	5.0	-5.8%	4.5	-16.7%	29.6	14.2%	32.4	-11.2%	39.5	-5.5%
Mar	4.0	-1.8%	3.9	-21.5%	4.5	0.0%	28.5	-3.7%	32.0	-1.1%	31.4	-20.5%
Apr	4.0	0.0%	4.1	4.8%	4.3	-4.4%	32.6	14.6%	33.7	5.3%	30.3	-3.5%
May	5.0	26.0%	4.7	16.4%	4.0	-7.0%	31.4	-3.8%	33.2	-1.5%	28.6	-5.6%
Jun	4.7	-5.9%	4.9	3.3%	3.8	-5.0%	35.8	14.0%	34.5	3.9%	27.9	-2.4%
Jul	4.5	-3.7%	4.5	-7.3%	3.6	-5.3%	35.7	-0.2%	35.2	2.1%	26.7	-4.3%
Aug	3.9	-13.5%	4.8	6.1%	3.4	-5.6%	32.6	-8.8%	37.3	6.0%	25.2	-5.6%
Sep	4.0	1.4%	4.6	-4.5%	3.2	-5.9%	31.2	-4.2%	39.8	6.9%	23.5	-6.7%
Oct	4.3	9.7%	4.9	5.7%	2.9	-9.4%	31.4	0.8%	37.1	-7.0%	21.6	-8.1%
Nov	4.0	-8.8%	4.4	-9.6%	2.7	-6.9%	34.8	10.6%	35.0	-5.6%	19.5	-9.7%
Dec	3.9	-0.6%	4.3	-1.3%	2.4	-11.1%	27.8	-20.0%	35.5	1.3%	17.5	-10.3%
Total	50.0		55.4		44.7		377.2		422.0		333.5	

Stoke and Staffordshire LEP LCEGS Sales Comparing Consecutive Months – Level 1 Low Carbon, Level 2 Alternative Fuels and Alternative Fuel Vehicles

	Alternative fuels						Alternative Fuel Vehicle					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	23.9	-	30.6	2.0%	33.6	15.9%	10.2	-	13.1	31.0%	13.4	2.3%
Feb	26.3	10.3%	30.7	0.3%	32.8	-2.4%	10.9	7.0%	11.2	-15.1%	14.5	8.2%
Mar	29.3	11.4%	25.4	-17.3%	29.9	-8.8%	10.2	-6.9%	9.8	-12.3%	9.4	-35.2%
Apr	26.4	-9.8%	29.8	17.2%	29.4	-1.7%	13.1	29.1%	11.0	12.8%	9.2	-2.1%
May	32.0	20.9%	30.3	1.8%	27.6	-6.1%	13.2	0.5%	13.2	19.5%	9.0	-2.2%
Jun	28.4	-11.1%	34.0	12.2%	26.0	-5.8%	12.5	-5.6%	13.9	5.1%	8.7	-3.3%
Jul	32.7	14.9%	31.9	-6.2%	24.1	-7.3%	12.8	2.2%	12.5	-10.0%	7.9	-9.2%
Aug	30.1	-7.8%	30.5	-4.4%	23.4	-2.9%	12.1	-5.4%	11.8	-5.5%	7.5	-5.1%
Sep	33.0	9.4%	31.8	4.3%	22.1	-5.6%	11.7	-2.8%	14.6	23.5%	7.0	-6.7%
Oct	34.6	4.9%	34.3	7.8%	21.5	-2.7%	12.5	6.9%	13.1	-10.1%	6.5	-7.1%
Nov	29.4	-15.0%	36.5	6.6%	19.4	-9.8%	12.4	-1.4%	11.9	-9.0%	6.0	-7.7%
Dec	30.0	2.2%	29.0	-20.6%	17.2	-11.3%	10.0	-19.3%	13.1	9.9%	5.3	-11.7%
Total	356.1		374.7		307.0		141.6		149.1		104.4	

Stoke and Staffordshire LEP LCEGS Sales Comparing Consecutive Months – Level 1 Renewable Energy, Level 2 Wind and Geothermal

	Wind						Geothermal					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	27.6	-	40.3	40.9%	43.3	27.0%	8.1	-	11.1	46.1%	11.5	6.5%
Feb	29.2	5.9%	36.3	-9.9%	43.0	-0.7%	8.2	1.4%	9.8	-11.3%	11.2	-2.6%
Mar	34.7	18.8%	32.3	-11.1%	30.5	-29.1%	8.2	-0.2%	9.3	-5.1%	8.8	-21.4%
Apr	35.4	2.2%	32.9	1.9%	29.5	-3.3%	9.8	20.7%	8.2	-11.7%	8.4	-4.5%
May	38.6	9.1%	37.1	12.5%	28.1	-4.7%	10.9	11.0%	9.7	17.6%	8.1	-3.6%
Jun	36.5	-5.6%	38.2	3.0%	27.1	-3.6%	9.1	-16.7%	11.3	16.6%	7.6	-6.2%
Jul	35.4	-2.9%	38.7	1.4%	26.1	-3.7%	10.2	11.7%	11.8	5.1%	7.3	-3.9%
Aug	37.0	4.3%	32.6	-15.7%	24.2	-7.3%	9.7	-4.6%	10.3	-13.1%	6.8	-6.8%
Sep	36.4	-1.6%	41.4	26.9%	22.6	-6.6%	9.3	-3.8%	11.3	9.9%	6.3	-7.4%
Oct	33.9	-6.7%	37.7	-8.8%	20.9	-7.5%	10.0	7.8%	9.5	-15.7%	5.8	-7.9%
Nov	33.4	-1.5%	37.1	-1.7%	19.1	-8.6%	8.6	-14.4%	11.3	18.6%	5.3	-8.6%
Dec	28.6	-14.5%	34.1	-8.0%	17.2	-9.9%	7.6	-12.1%	10.8	-4.5%	4.7	-11.3%
Total	406.6		438.7		331.6		109.6		124.4		91.8	

Stoke and Staffordshire LEP LCEGS Sales Comparing Consecutive Months – Level 1 Renewable Energy, Level 2 Photovoltaic and Biomass

	Photovoltaic						Biomass					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	18.0	-	24.2	14.2%	27.6	12.7%	13.5	-	16.8	33.3%	17.7	4.1%
Feb	22.8	27.0%	23.1	-4.8%	25.5	-7.6%	14.6	7.9%	18.0	7.2%	17.5	-1.1%
Mar	19.1	-16.0%	21.9	-5.2%	22.9	-10.2%	15.6	6.6%	13.4	-25.7%	13.9	-20.6%
Apr	21.1	10.3%	24.5	12.0%	22.2	-3.1%	16.1	3.4%	16.0	19.5%	13.3	-4.3%
May	21.7	2.6%	22.8	-6.8%	21.2	-4.5%	17.3	7.2%	17.3	8.0%	13.0	-2.3%
Jun	22.3	3.0%	23.8	4.3%	20.0	-5.7%	16.0	-7.4%	18.2	5.2%	12.4	-4.6%
Jul	23.2	4.1%	26.4	11.2%	19.2	-4.0%	17.9	11.9%	19.6	8.1%	12.0	-3.2%
Aug	22.8	-1.7%	21.7	-17.8%	18.1	-5.7%	16.2	-9.5%	15.1	-23.3%	11.5	-4.2%
Sep	23.3	1.9%	27.7	27.3%	16.9	-6.6%	16.4	1.3%	17.7	17.6%	10.9	-5.2%
Oct	26.0	11.8%	24.6	-11.2%	15.5	-8.3%	16.4	0.2%	18.6	5.0%	10.1	-7.3%
Nov	23.5	-9.6%	26.2	6.5%	14.0	-9.7%	15.8	-3.6%	16.7	-10.1%	9.1	-9.9%
Dec	21.2	-10.0%	24.5	-6.3%	12.7	-9.3%	12.6	-20.2%	17.0	1.5%	8.1	-11.0%
Total	265.1		291.4		235.8		188.5		204.4		149.5	

Stoke and Staffordshire LEP LCEGS Sales Comparing Consecutive Months – Level 1 Environmental, Level 2 Water and Waste Water and Waste Management

	Water and Waste Water						Waste Management					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	12.5	-	16.3	19.9%	17.2	-6.5%	12.2	-	15.1	28.0%	16.5	5.8%
Feb	15.0	20.4%	17.8	9.5%	18.5	7.6%	13.3	8.4%	14.4	-5.0%	16.8	1.8%
Mar	13.7	-8.7%	15.9	-10.5%	14.8	-20.0%	13.5	1.8%	13.3	-7.2%	12.2	-27.4%
Apr	14.5	6.0%	15.3	-3.7%	14.5	-2.0%	13.3	-1.5%	13.2	-1.0%	11.9	-2.5%
May	16.9	16.4%	17.2	11.9%	13.9	-4.1%	16.2	21.5%	14.8	12.4%	11.4	-4.2%
Jun	15.3	-9.8%	17.6	2.3%	13.2	-5.0%	14.0	-13.6%	14.2	-4.2%	10.9	-4.4%
Jul	15.8	3.7%	17.9	1.8%	12.6	-4.5%	13.6	-2.8%	15.5	9.3%	10.5	-3.7%
Aug	14.8	-6.8%	17.6	-1.7%	12.0	-4.8%	14.0	3.4%	15.3	-1.5%	10.0	-4.8%
Sep	14.9	1.1%	17.4	-0.9%	11.0	-8.3%	15.4	9.7%	16.3	6.8%	9.3	-7.0%
Oct	17.9	19.9%	17.1	-2.1%	10.2	-7.3%	16.2	5.6%	16.2	-0.6%	8.6	-7.5%
Nov	16.3	-8.9%	19.4	13.6%	9.4	-7.8%	12.8	-21.2%	15.7	-3.4%	7.9	-8.1%
Dec	13.6	-16.8%	18.4	-4.8%	8.4	-10.6%	11.8	-7.4%	15.6	-0.4%	7.2	-8.9%
Total	181.2		207.8		155.7		166.2		179.7		133.2	

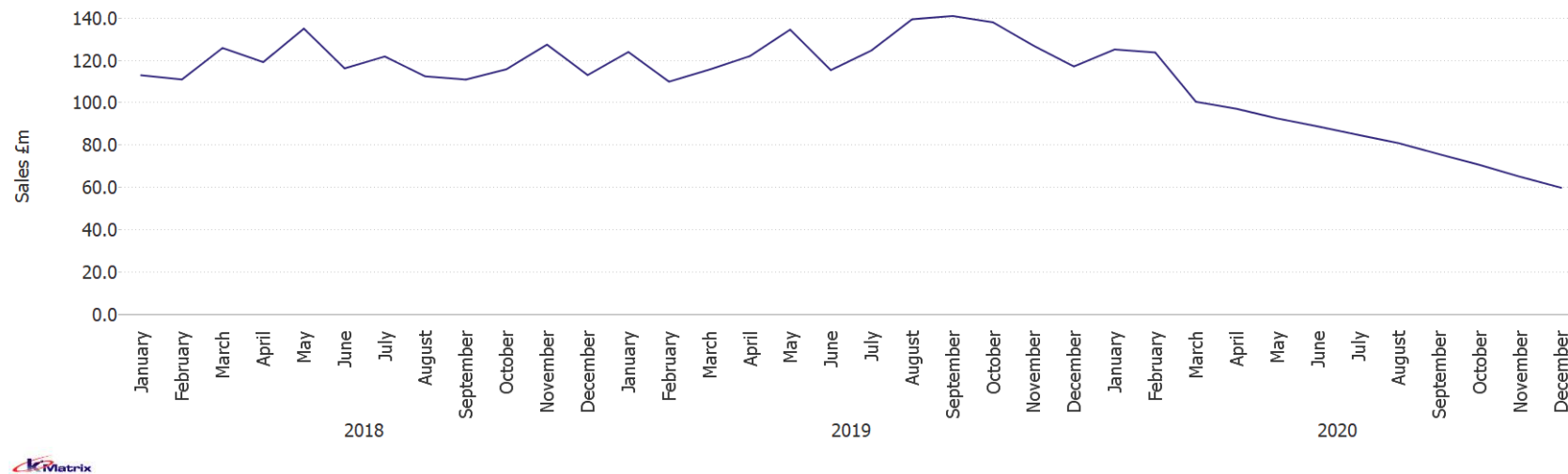
Stoke and Staffordshire LEP LCEGS Sales Comparing Consecutive Months – Level 1 Environmental, Level 2 Recovery & Recycling

	Recovery & Recycling					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	9.1	-	11.9	12.3%	13.8	4.5%
Feb	11.4	25.1%	11.5	-2.8%	12.6	-8.7%
Mar	10.1	-11.1%	11.3	-2.0%	11.5	-8.7%
Apr	11.8	16.6%	11.0	-3.0%	11.1	-3.5%
May	12.7	7.7%	10.8	-1.4%	10.5	-5.4%
Jun	12.6	-0.6%	12.0	10.6%	10.0	-4.8%
Jul	13.1	3.7%	13.7	14.4%	9.6	-4.0%
Aug	11.0	-16.0%	12.5	-8.6%	9.0	-6.3%
Sep	12.1	9.6%	13.0	3.8%	8.4	-6.7%
Oct	11.9	-1.1%	13.2	1.9%	7.9	-6.0%
Nov	10.5	-12.1%	14.0	6.1%	7.2	-8.9%
Dec	10.6	0.9%	13.2	-6.2%	6.5	-9.7%
Total	136.7		148.0		118.1	

Appendix I – Worcestershire LEP

Sector LCEGS Line Graphs – Sales, Companies and Employees

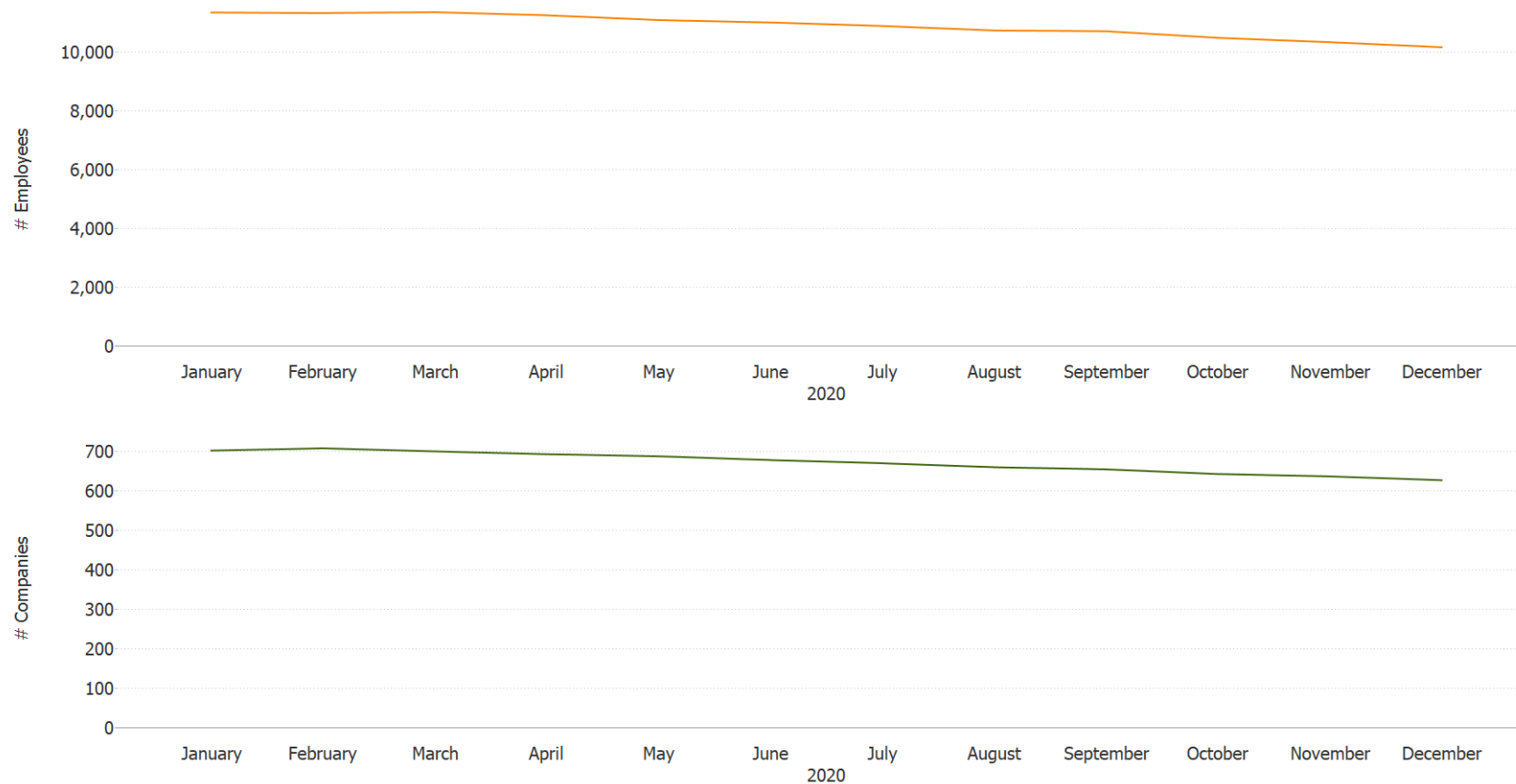
Worcestershire LEP LCEGS Sales by month from January 2018 through to December 2020



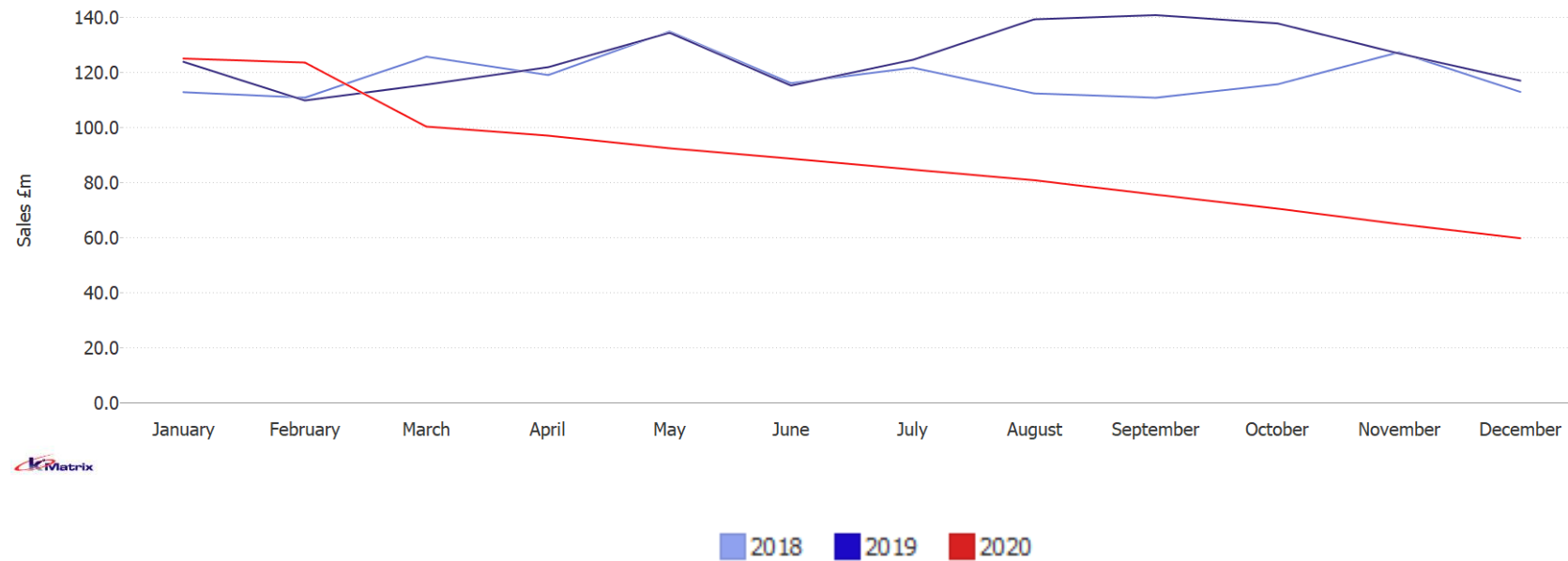
The variability of the sales value per month is normal and to be expected, what we can see is that a line of best fit would indicate overall growth in the sector between January 2018 and March 2020, followed by the contraction of the sector from March onwards.

Worcestershire LEP LCEGS Number of Employees and Companies by month from January 2020 through to December 2020

Monthly company and employee figures do fluctuate slightly month-to-month, in a normal year, however the continued decline from March onwards is not normal.

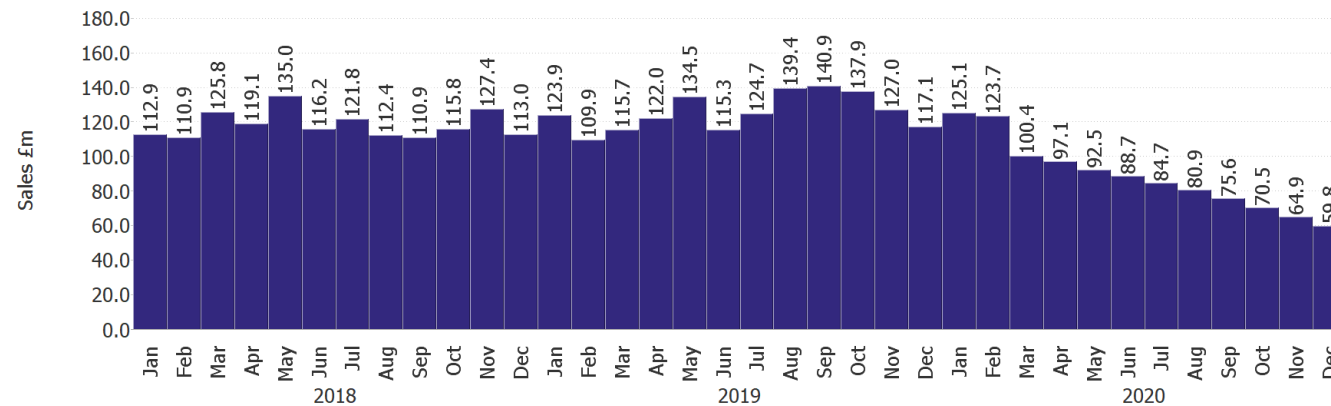


Worcestershire LEP LCEGS Sales by month, split by calendar year



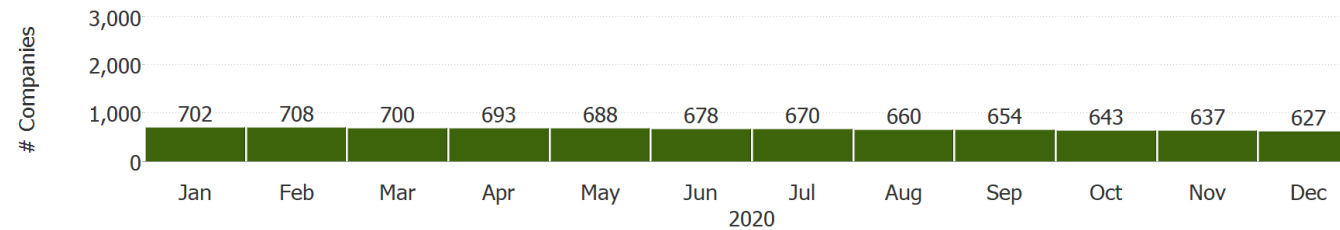
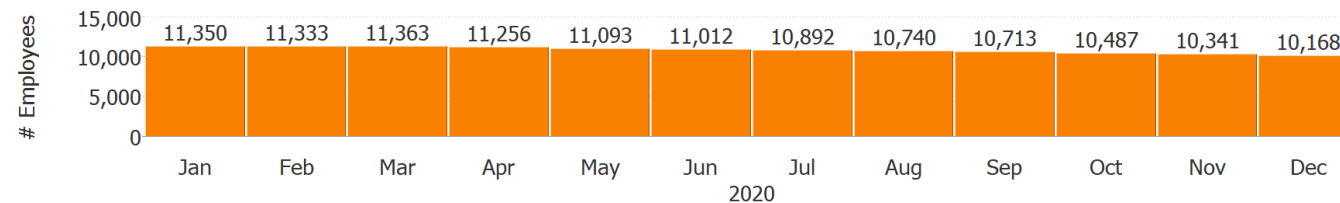
Sector LCEGS Histograms – Sales, Companies and Employees

Worcestershire LEP LCEGS Sales



KMatrix

Worcestershire LEP LCEGS Number of Employees and Companies



KMatrix

Sector, Level 1 & 2 LCEGS Data Tables – Sales

Sector

Worcestershire LEP LCEGS Comparing Growth in Consecutive Months – Sector Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	112.9	-	123.9	9.6%	125.1	6.8%
February	110.9	-1.8%	109.9	-11.3%	123.7	-1.1%
March	125.8	13.4%	115.7	5.3%	100.4	-18.8%
April	119.1	-5.3%	122.0	5.5%	97.1	-3.3%
May	135.0	13.3%	134.5	10.3%	92.5	-4.7%
June	116.2	-13.9%	115.3	-14.3%	88.7	-4.1%
July	121.8	4.8%	124.7	8.1%	84.7	-4.5%
August	112.4	-7.7%	139.4	11.8%	80.9	-4.5%
September	110.9	-1.4%	140.9	1.1%	75.6	-6.6%
October	115.8	4.4%	137.9	-2.1%	70.5	-6.7%
November	127.4	10.1%	127.0	-7.9%	64.9	-7.9%
December	113.0	-11.3%	117.1	-7.8%	59.8	-7.9%
Total	1,421.3		1,508.4		1,063.9	

Level 1

Worcestershire LEP LCEGS Comparing Growth in Consecutive Months – Low Carbon Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	43.6	-	49.6	11.2%	48.7	8.2%
February	42.7	-2.2%	41.6	-16.2%	46.7	-4.1%
March	49.8	16.7%	44.2	6.3%	36.9	-21.0%
April	45.1	-9.5%	44.0	-0.5%	35.5	-3.8%
May	52.1	15.6%	52.1	18.5%	33.9	-4.5%
June	44.7	-14.3%	44.8	-14.0%	32.6	-3.8%
July	46.1	3.3%	48.2	7.6%	31.6	-3.1%
August	43.7	-5.2%	51.8	7.4%	30.4	-3.8%
September	43.1	-1.5%	52.6	1.6%	28.6	-5.9%
October	43.7	1.4%	54.4	3.5%	27.0	-5.6%
November	49.8	13.9%	50.3	-7.7%	24.9	-7.8%
December	44.6	-10.4%	45.0	-10.4%	22.9	-8.0%
Total	549.0		578.6		399.7	

Worcestershire LEP LCEGS Comparing Growth in Consecutive Months – Renewable Energy Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	45.1	-	46.3	8.4%	48.9	7.7%
February	44.0	-2.4%	43.5	-6.1%	50.8	3.9%
March	47.6	8.1%	44.3	1.8%	40.6	-20.1%
April	47.3	-0.6%	48.9	10.5%	39.5	-2.7%
May	53.5	13.1%	53.8	10.0%	37.4	-5.3%
June	45.3	-15.4%	43.7	-18.8%	35.9	-4.0%
July	47.3	4.4%	48.6	11.3%	33.8	-5.8%
August	43.7	-7.6%	56.5	16.1%	32.3	-4.4%
September	43.8	0.3%	55.8	-1.2%	30.1	-6.8%
October	46.1	5.1%	52.3	-6.2%	27.9	-7.3%
November	50.3	9.2%	49.8	-4.9%	25.7	-7.9%
December	42.7	-15.1%	45.4	-8.8%	23.7	-7.8%
Total	556.6		589.0		426.6	

Worcestershire LEP LCEGS Comparing Growth in Consecutive Months – Environmental Sales

Month	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
January	24.2	-	28.0	8.9%	27.5	3.0%
February	24.2	0.1%	24.8	-11.4%	26.2	-4.7%
March	28.4	17.3%	27.2	9.6%	22.9	-12.6%
April	26.7	-6.0%	29.1	7.0%	22.1	-3.5%
May	29.4	9.9%	28.6	-1.8%	21.1	-4.5%
June	26.2	-10.6%	26.8	-6.2%	20.3	-3.8%
July	28.4	8.1%	27.8	3.9%	19.3	-4.9%
August	25.0	-11.8%	31.2	12.1%	18.2	-5.7%
September	24.0	-4.2%	32.6	4.4%	16.9	-7.1%
October	26.0	8.6%	31.2	-4.2%	15.6	-7.7%
November	27.4	5.2%	27.0	-13.5%	14.4	-7.7%
December	25.7	-6.0%	26.7	-1.1%	13.2	-8.3%
Total	315.7		340.7		237.7	

Although there have been fluctuations in sales on a month-by-month basis prior to Covid-19, this is normal fluctuation. There has been a consistent drop in growth each month between April to December in 2020 in all three Level 1 sub-sectors, indicating a continued contraction of the market. For Environmental, the contraction is increasing with higher negative growth rates August-December than were seen April-June.

Level 2

Worcestershire LEP LCEGS Sales Comparing Consecutive Months – Level 1 Low Carbon, Level 2 Energy Management and Building Technologies

	Energy Management						Building Technologies					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	2.2	-	2.4	9.1%	2.8	7.7%	17.4	-	20.0	9.3%	17.3	-3.4%
Feb	2.3	3.2%	2.4	-0.9%	2.5	-10.7%	17.9	3.1%	16.5	-17.3%	18.4	6.4%
Mar	2.7	19.3%	2.6	10.5%	2.0	-20.0%	18.7	4.1%	17.4	5.5%	13.6	-26.1%
Apr	2.3	-15.1%	2.5	-5.9%	1.9	-5.0%	17.6	-5.7%	16.7	-4.3%	12.9	-5.1%
May	2.8	23.1%	2.7	7.3%	1.8	-5.3%	20.3	15.4%	19.3	16.0%	12.4	-3.9%
Jun	2.3	-20.9%	2.3	-14.1%	1.8	0.0%	16.9	-16.6%	18.4	-4.7%	11.9	-4.0%
Jul	2.4	5.0%	2.6	12.7%	1.7	-5.6%	16.6	-1.9%	19.5	5.9%	11.5	-3.4%
Aug	2.3	-2.4%	2.7	4.0%	1.6	-5.9%	17.7	6.7%	19.2	-1.6%	11.0	-4.3%
Sep	2.2	-4.5%	3.0	10.6%	1.5	-6.3%	16.3	-8.4%	21.2	10.6%	10.1	-8.2%
Oct	2.2	-1.8%	2.7	-8.9%	1.4	-6.7%	17.5	7.5%	21.4	0.8%	9.4	-6.9%
Nov	2.6	21.3%	2.4	-11.4%	1.3	-7.1%	19.2	10.0%	20.5	-4.2%	8.5	-9.6%
Dec	2.2	-15.8%	2.6	7.6%	1.2	-7.7%	18.3	-4.9%	17.9	-13.0%	7.8	-8.2%
Total	28.5		30.7		21.5		214.6		228.1		144.8	

Worcestershire LEP LCEGS Sales Comparing Consecutive Months – Level 1 Low Carbon, Level 2 Alternative Fuels and Alternative Fuel Vehicles

	Alternative fuels						Alternative Fuel Vehicle					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	15.9	-	18.7	19.9%	19.3	15.6%	6.8	-	7.0	0.0%	7.7	18.5%
Feb	14.8	-6.4%	15.3	-18.4%	17.5	-9.3%	6.3	-6.8%	6.0	-14.3%	6.9	-10.4%
Mar	19.2	29.4%	16.0	4.7%	14.3	-18.3%	7.6	21.4%	6.6	10.5%	5.6	-18.8%
Apr	17.4	-9.2%	16.4	2.7%	14.0	-2.1%	6.4	-16.6%	7.0	4.6%	5.4	-3.6%
May	19.6	12.1%	20.1	22.2%	13.2	-5.7%	7.9	24.1%	8.4	20.8%	5.3	-1.9%
Jun	17.3	-11.7%	16.3	-19.0%	12.6	-4.5%	6.8	-14.1%	6.4	-24.1%	5.2	-1.9%
Jul	18.6	7.9%	17.9	10.1%	12.4	-1.6%	6.9	2.2%	6.8	6.7%	4.9	-5.8%
Aug	16.6	-11.1%	19.5	8.9%	12.1	-2.4%	5.8	-17.1%	8.7	27.7%	4.6	-6.1%
Sep	16.5	-0.7%	18.8	-3.8%	11.7	-3.3%	6.7	17.3%	7.9	-9.5%	4.3	-6.5%
Oct	16.1	-2.1%	21.4	14.0%	11.3	-3.4%	6.5	-3.6%	7.3	-7.3%	4.0	-7.0%
Nov	19.5	21.3%	18.5	-13.6%	10.5	-7.1%	6.9	5.4%	7.3	-0.4%	3.7	-7.5%
Dec	15.6	-20.3%	16.7	-9.5%	9.8	-6.7%	7.0	2.7%	6.5	-11.1%	3.3	-10.8%
Total	207.0		215.4		158.7		81.6		85.8		60.9	

Worcestershire LEP LCEGS Sales Comparing Consecutive Months – Level 1 Renewable Energy, Level 2 Wind and Geothermal

	Wind						Geothermal					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	19.5	-	18.9	6.2%	20.1	5.2%	5.0	-	5.2	13.0%	5.1	-5.6%
Feb	16.9	-13.2%	18.1	-4.4%	22.4	11.4%	5.1	2.4%	4.5	-13.8%	5.0	-2.0%
Mar	19.2	13.8%	18.3	1.5%	17.9	-20.1%	6.0	17.2%	5.2	15.9%	4.3	-14.0%
Apr	21.4	11.5%	20.8	13.2%	17.5	-2.2%	4.8	-19.0%	6.0	16.9%	4.2	-2.3%
May	22.8	6.2%	23.5	13.0%	16.6	-5.1%	5.8	20.4%	5.8	-3.6%	4.0	-4.8%
Jun	18.7	-17.7%	18.0	-23.3%	16.0	-3.6%	5.3	-8.8%	5.0	-14.0%	3.8	-5.0%
Jul	18.2	-3.0%	20.9	16.2%	14.9	-6.9%	5.9	11.1%	5.1	2.8%	3.6	-5.3%
Aug	19.2	5.7%	24.7	18.1%	14.3	-4.0%	4.4	-25.7%	5.6	9.3%	3.4	-5.6%
Sep	18.1	-6.0%	22.8	-7.8%	13.4	-6.3%	5.1	15.9%	5.8	3.5%	3.2	-5.9%
Oct	20.0	10.8%	22.3	-2.1%	12.5	-6.7%	5.4	6.0%	6.0	2.8%	3.0	-6.3%
Nov	20.9	4.2%	22.3	0.1%	11.6	-7.2%	5.0	-6.7%	5.7	-4.2%	2.7	-10.0%
Dec	17.8	-14.8%	19.1	-14.6%	10.7	-7.8%	4.6	-7.8%	5.4	-6.3%	2.5	-7.4%
Total	232.6		249.7		187.9		62.5		65.3		44.8	

Worcestershire LEP LCEGS Sales Comparing Consecutive Months – Level 1 Renewable Energy, Level 2 Photovoltaic and Biomass

	Photovoltaic						Biomass					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	11.4	-	11.4	0.9%	13.0	6.6%	8.5	-	9.9	20.7%	9.8	24.1%
Feb	12.2	7.6%	11.7	2.1%	13.4	3.1%	9.0	6.2%	8.5	-14.6%	9.1	-7.1%
Mar	12.3	0.6%	11.0	-5.8%	10.4	-22.4%	9.2	2.3%	9.0	5.7%	7.2	-20.9%
Apr	11.3	-8.4%	11.3	3.2%	10.1	-2.9%	8.9	-3.3%	9.9	10.8%	7.0	-2.8%
May	13.7	21.5%	14.1	24.1%	9.5	-5.9%	10.2	15.1%	9.6	-3.5%	6.7	-4.3%
Jun	11.0	-19.5%	11.5	-18.3%	9.1	-4.2%	9.3	-8.6%	8.4	-12.6%	6.4	-4.5%
Jul	13.2	19.2%	11.7	1.9%	8.6	-5.5%	9.1	-2.6%	10.0	18.7%	6.1	-4.7%
Aug	10.5	-20.0%	14.9	27.2%	8.2	-4.7%	8.8	-2.9%	10.2	2.7%	5.9	-3.3%
Sep	10.9	3.2%	15.3	2.7%	7.6	-7.3%	9.0	2.3%	10.9	6.6%	5.4	-8.5%
Oct	11.3	4.3%	13.0	-15.0%	7.0	-7.9%	8.5	-6.0%	10.0	-8.0%	5.0	-7.4%
Nov	13.7	21.4%	11.9	-8.5%	6.5	-7.1%	9.7	14.1%	8.9	-11.4%	4.5	-10.0%
Dec	11.3	-17.6%	12.2	2.3%	6.0	-7.7%	8.2	-16.0%	7.9	-10.6%	4.1	-8.9%
Total	142.9		149.8		109.4		108.5		113.3		77.2	

Worcestershire LEP LCEGS Sales Comparing Consecutive Months – Level 1 Environmental, Level 2 Water and Waste Water and Waste Management

	Water and Waste Water						Waste Management					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	7.8	-	8.9	-4.3%	9.7	10.2%	7.2	-	8.9	17.1%	8.0	-3.6%
Feb	8.6	10.4%	8.3	-7.2%	9.7	0.0%	7.4	2.6%	7.6	-14.9%	7.4	-7.5%
Mar	9.2	6.6%	9.1	9.6%	7.5	-22.7%	9.2	24.7%	8.7	13.9%	7.2	-2.7%
Apr	9.9	7.5%	10.0	9.7%	7.2	-4.0%	7.8	-15.4%	8.8	1.6%	7.0	-2.8%
May	10.3	4.1%	9.2	-7.5%	6.9	-4.2%	9.2	18.9%	8.3	-5.8%	6.7	-4.3%
Jun	8.4	-18.5%	8.9	-3.1%	6.6	-4.3%	8.5	-8.1%	8.2	-1.4%	6.4	-4.5%
Jul	10.0	19.9%	10.0	11.8%	6.2	-6.1%	8.6	1.8%	8.0	-1.8%	6.1	-4.7%
Aug	8.1	-19.7%	10.6	6.5%	5.8	-6.5%	7.8	-9.2%	9.5	18.6%	5.8	-4.9%
Sep	7.9	-2.1%	11.0	4.0%	5.5	-5.2%	7.5	-4.2%	9.9	4.1%	5.4	-6.9%
Oct	9.2	16.7%	11.2	1.6%	5.1	-7.3%	8.5	13.8%	9.8	-0.9%	4.9	-9.3%
Nov	9.3	1.4%	8.8	-21.9%	4.7	-7.8%	7.9	-7.4%	8.0	-19.1%	4.5	-8.2%
Dec	9.3	-0.6%	8.8	0.5%	4.4	-6.4%	7.6	-3.4%	8.3	4.2%	4.1	-8.9%
Total	107.9		114.8		79.3		97.3		104.1		73.5	

Worcestershire LEP LCEGS Sales Comparing Consecutive Months – Level 1 Environmental, Level 2 Recovery & Recycling

	Recovery & Recycling					
	Sales (£m) 2018	% Growth	Sales (£m) 2019	% Growth	Sales (£m) 2020	% Growth
Jan	6.7	-	7.3	19.7%	6.9	-1.4%
Feb	5.7	-15.2%	6.4	-13.1%	6.1	-11.6%
Mar	7.3	28.2%	6.8	6.4%	5.8	-4.9%
Apr	6.3	-13.3%	7.4	10.0%	5.6	-3.4%
May	6.7	6.2%	8.0	6.9%	5.4	-3.6%
Jun	6.7	0.0%	7.0	-12.6%	5.2	-3.7%
Jul	6.8	0.7%	6.9	-0.8%	4.9	-5.8%
Aug	6.7	-1.7%	7.7	11.7%	4.6	-6.1%
Sep	6.0	-10.4%	8.4	9.2%	4.3	-6.5%
Oct	5.7	-4.1%	7.1	-15.1%	4.0	-7.0%
Nov	7.3	27.4%	7.4	2.8%	3.6	-10.0%
Dec	6.1	-15.8%	7.0	-4.5%	3.3	-8.3%
Total	78.0		87.4		59.7	