

SOUTH GLOUCESTERSHIRE ECONOMIC REVIEW

MARCH 2007

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Section 1

Overview

South Gloucestershire stretches from the Severn Estuary in the west to the Cotswolds – an area that takes in low lying estuarine lands, the Severn Vale and an extensive rural area rising eastward towards the Cotswolds, an Area of Outstanding Natural Beauty. Much of the 250,000 population of South Gloucestershire is concentrated in the expanding northern and eastern urban fringe areas of Bristol. Yate / Chipping Sodbury and Thornbury are the largest freestanding settlements with populations of 35,000 and 14,000 respectively.

South Gloucestershire has one of the fastest growing economies in the country with an estimated 40,000 jobs being generated between 1996 and 2006, predominantly in the Bristol North Fringe area. There were an estimated 150,000 persons employed in South Gloucestershire at April 2006 (employees and self employed).

For many years the economy of South Gloucestershire has been closely associated with the aerospace industry with Airbus UK (formerly British Aerospace) based at Filton and Rolls Royce at Patchway. The aerospace industry is a key economic sector employing as it does some 11,000: major projects include the design and manufacture of wings for Airbus and the design and manufacture of military jet engines (Rolls Royce).

Other significant manufacturing industries in South Gloucestershire include electrical engineering and packaging. Local and central government (the Ministry of Defence), the health sector, retailing, higher education (the University of the West of England) and further education and telecommunications are also well represented.

Kingswood, Yate and Thornbury contain well-established industrial areas providing local employment opportunities. Prominent companies in the Kingswood / Warmley / Hanham area include Knorr-Bremse and Alcan Packaging.

Almost 200 companies occupy premises on the five industrial estates in Yate (Great Western Business Park, Stover Trading Estate, Beeches Trading Estate, Badminton Road Trading Estate and Westerleigh Business Park). Major employers in Yate and Chipping Sodbury include Indesit, Smurfit Yate, Jordan Engineering, Mead Westvaco, Sharp Interpack and Hanson Quarry Products.

Thornbury Industrial Estate is home to over 50 companies including Essilor and Alexandra Workwear.

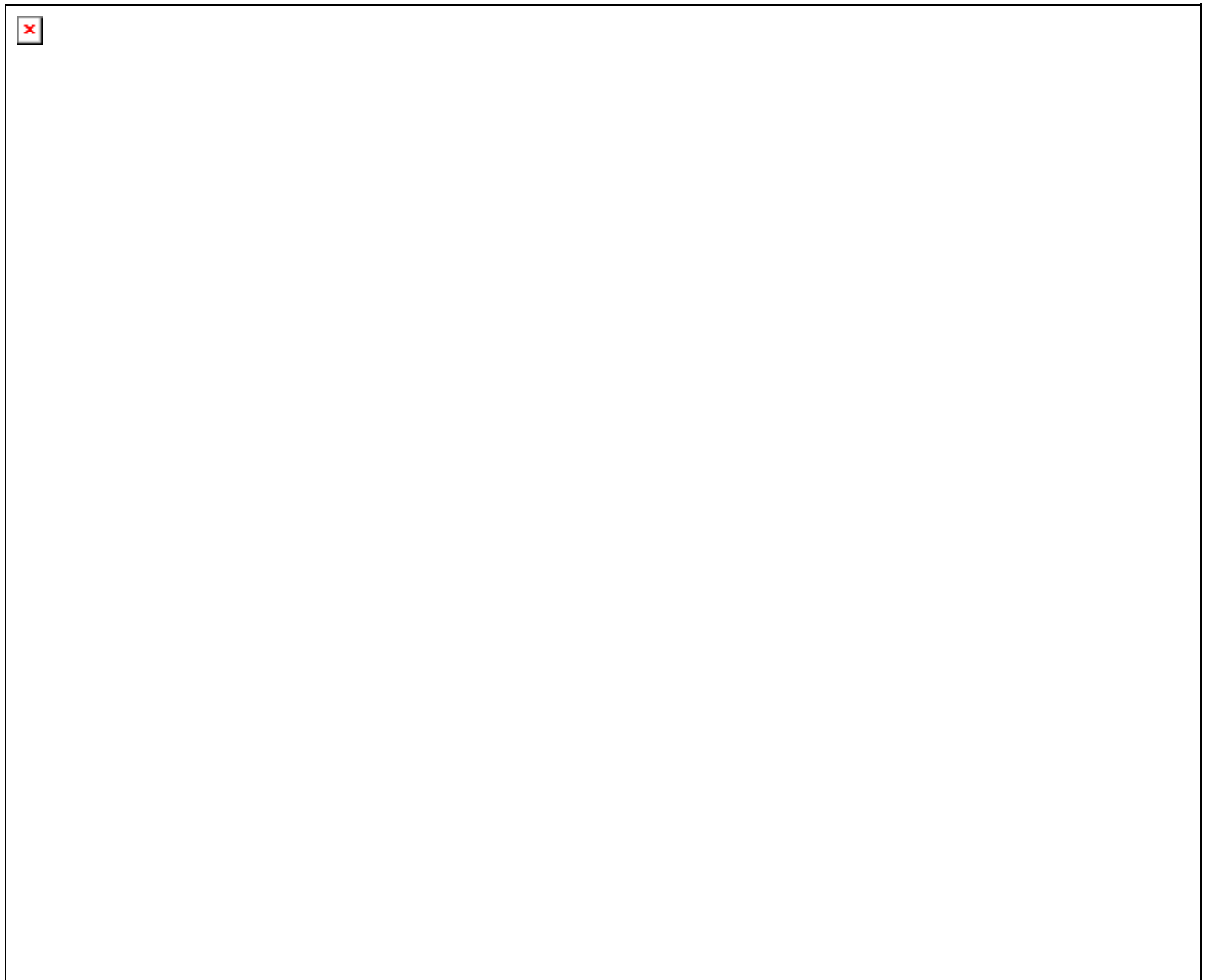
AstraZeneca. Terra Nitrogen (UK) and Constellation Europe are major employers at Severnside.

The development of the Regional Shopping Centre at Cribbs Causeway, the relocation of major companies from Bristol (e.g. AXA, Royal Mail, GE Capital Equipment) and large-scale business park development have established Bristol North Fringe as one of the largest employment areas in the South West. The collocation of the Defence Procurement Agency to Abbey Wood in the late 1990s brought over 6,000 jobs to the North Fringe: the proposed move of the Defence Logistics Organisation will bring another 1,500 + jobs.

Companies expanding in recent years include Airbus UK, the RAC and Cornhill Direct, all located in Bristol North Fringe. Manufacturing jobs continue to be lost with several major companies closing in recent years including Intier Automotive and Hibernia Brands.

Unemployment levels have remained reasonably constant at around the 1,500 mark over the past five years - at December 2006 the rate stood at 1.0% (Great Britain 2.5%): only one of the 35 wards in South Gloucestershire had an unemployment rate of over 2% at December 2006.

While the scale and pace of economic growth has brought prosperity it has also created major challenges with a substantial increase in traffic, pressure on the transport infrastructure and pressure for more housing on green field sites. A key issue is how to manage the scale, pace and location of development so as to safeguard the quality of life of people living and working in South Gloucestershire.



Section 2

Employment in South Gloucestershire

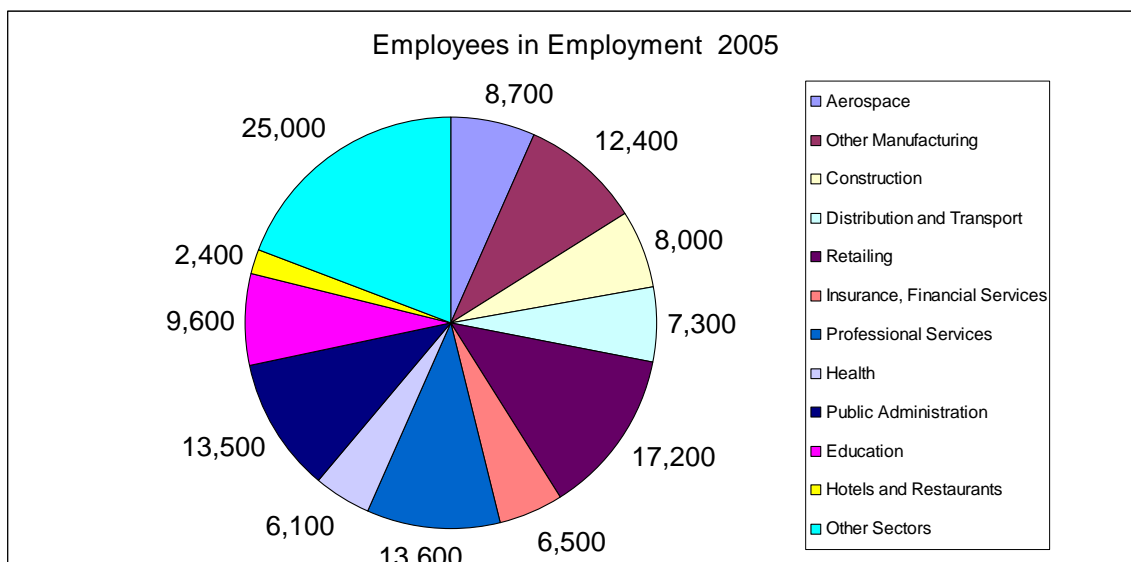
The 2005 Annual Business Survey indicates that there were 137,560 employees in employment in South Gloucestershire in 2005 compared with 96,800 in 1998. This suggests a 40,000 increase in employment over the seven year period but the 1998 figure is almost certainly an underestimate (by as much as 10,000) and the 2005 figure may well be an overestimate. Annual average employment growth is probably around the 4,000 mark rather than the 5,800 figure suggested by Table 1.

Table 1 : Employees in Employment 1998 - 2005

	1998	2001	2004	2005	% Change 1998 - 2005
1 : Agriculture and Fishing	106	168	90	92	-13%
2 : Energy and Water	1,198	1,265	857	664	-46%
3 : Manufacturing	17,904	18,212	20,934	21,065	+18%
4 : Construction	5,297	7,414	7,955	8,047	+52%
5 : Retailing, Distribution, Hotels and Restaurants	22,702	28,650	30,126	29,837	+31%
6 : Transport and communications	7,255	10,508	10,155	11,579	+60%
7 : Banking, Finance and Insurance, Business services, etc	16,885	18,374	26,428	31,113	+84%
8 : Public Administration, Education & Health	22,686	26,014	29,827	30,684	+35%
9 : Other services	2,769	3,703	4,821	4,477	+62%
Total	96,802	114,307	131,194	137,560	+42%

The last few years have seen the major expansion of jobs in the retailing and hotels sector, financial and business services and public administration (eg MoD).

Table 2: Major Business Sectors in South Gloucestershire



South Gloucestershire has a relatively high proportion of jobs in manufacturing (15% - due largely to the two major aerospace companies), further and higher education, public administration, retailing and transport / distribution

Table 3: Employment by Area

Area	2003	2005
Bristol North Fringe	70,000	71,800
Kingswood / East Fringe	27,300	26,000
Yate / Chipping Sodbury	15,700	16,100
Thornbury	6,900	7,400
Sevenside	1,800	1,900

Over half the jobs in South Gloucestershire are Bristol North Fringe are located in the Bristol North Fringe area: the number of jobs in this area is continuing to grow at approximately 1,000 per annum. The Kingswood area has suffered job losses in recent years and this is partly reflected in the relatively high levels of unemployment (section 6).

Section 3

Major Job Gains and Losses January 2004 – February 2007

Tables 4 and 5 present significant job gains and losses in South Gloucestershire over the last three years: appendices 1B and 1B respectively provide more comprehensive listings of job gains and losses.

Table 4; Major Job Gains in South Gloucestershire 2004 - 2007

Company	Activity	Location	Jobs Gained
RAC	Motoring Organisation	Aztec West	100 (net)
Ministry of Defence	Defence Logistics	Stoke Gifford	2,000 proposed
Thales	Defence Consultancy	Stoke Gifford	300+
Airbus UK	Aerospace	Filton	1, 900
Constellation Europe	Distribution	Sevenside	120
WS Atkins	Engineering Consultants	Aztec West	150+
GE Capital Equipment Finance	Equipment Financing	Aztec West	400
University of the West of England	University	Frenchay	200
Filton College	College of Further Education	Filton	200

- The job gains are largely in the North Fringe area and Emersons Green with Sevenside also featuring: relatively few jobs have been attracted to the Kingswood / Warmley / Hanham area.
- Aerospace and defence account for almost 2,000 of the job gains over the three years: a further 2,000 defence jobs will locate to Abbey Wood and Stoke Gifford in the next few years.
- Other sectors recording job gains includes distribution, retailing and further and higher education. A number of manufacturing companies have recorded job gains but these have not compensated for the jobs being lost.

Table 5; Major Job Losses in South Gloucestershire 2004 - 2007

Company	Activity	Location	Jobs Lost
HSBC	Banking Services	Aztec West	300
AXA	Insurance	Stoke Gifford	200
Bristol and West BS	Financial Services	Stoke Gifford	300
British Energy	Nuclear Power Station	Oldbury	350 proposed
Airbus UK	Aerospace	Filton	750+ proposed
Rolls Royce	Aero Engines	Patchway	450
Morrisons	Distribution Depot	Cribbs Causeway	700
Intier Automotive	Car Trim	Bitton	320
Kleeneze	Household Goods	Warmley	300 proposed
Hewlett Packard	Computer Peripherals	Stoke Gifford	200+

- The list includes a number of very prominent companies including AXA, Hewlett Packard, Rolls Royce and Airbus UK.

- The loss of financial services jobs from the North Fringe has been serious – almost 1,000 jobs lost over the three years.
- The loss of manufacturing and related jobs from the wider Kingswood area continues. Intier Automotive and Kleeneze are listed above – other casualties include Lindman Doorsets, Bousfield, Courtaulds Bodywear, UK Safety, Kerry Foods and Dinkie Heel. In total over 1,000 manufacturing jobs have been lost in the Kingswood area over the past five years.
- Given the high profile of South Gloucestershire and the West of England as a centre for high technology and electronics it is worrying that a number of high profile electronics companies are losing jobs.

Table 6 : Major Employers in South Gloucestershire

	Name of Company/Organisation	Location	Activity	Est. Jobs
1	South Gloucestershire Council	Various	Local Authority	10, 400
2	Ministry of Defence	Stoke Gifford	MoD HQ – primarily the Defence Procurement Agency	7,000
3	Airbus UK	Filton	Aerospace – Wing Design/Manufacture	6,500
4	Rolls Royce Military Engines	Patchway	Military Aero Engines	3,600
5	North Bristol NHS Trust	Frenchay	Health Trust	3,000
6	AXA	Stoke Gifford	Insurance	2,700
7	University of the West of England	Frenchay	University	2,500
8	Orange	Bradley Stoke	Mobile Phone Network	2,400
9	John Lewis	Cribbs Causeway	Department Store	1,270
10	Royal Mail West of England Centre	Patchway	Mail Sorting Office	1,200
11	Asda WalMart	Cribbs Causeway	Superstore	1,000
12	Asda Stores	Longwell Green	Superstore	900
13	Filton College	Filton	College of Further Education	850
14	Hewlett Packard	Stoke Gifford	Data Storage Systems	800
15	Indesit	Yate	Electrical Appliances	800
16	RAC Motoring Services	Bradley Stoke	Motoring Services	800
17	Atkins Highway and Transportation Engineers	Aztec West	Highway and Transportation Engineers	650
18	South Gloucestershire Primary Care Trust	Various	Primary Care Trust	650
19	Marks and Spencers	Cribbs Causeway	Department Store	600
20	Avon & Somerset Police	Various	Police	600
21	Sainsburys / Exel Logistics	Emersons Green	Regional Distribution Centre	600
22	Thales/Aircraft Carrier Alliance	Frenchay	Naval Engineering Consultants	600
23	MBDA	Filton	Defence Systems	500
24	Royal Bank of Scotland	Aztec West	Banking Services	500
25	BAE Systems	Filton	Aerospace	500
26	Essilor	Thornbury	Ophthalmic Lenses	450
27	Tesco Stores	Bradley Stoke	Superstore	450
28	Sainsburys	Filton	Superstore	450
29	Serco – Home Affairs Division	Pucklechurch	Young Offenders Centre	440
30	Cornhill Direct	Aztec West	Home and Motor Insurance	400
31	Cap Gemini	Aztec West	I T Services	400
32	Sainsburys	Emersons Green	Superstore	400
33	AstraZeneca	Sevenside	Pharmaceuticals	400
34	Royal Mail	Sevenside	Business and Direct Mail	400
35	G E Capital Equipment Finance	Aztec West	Equipment Financing	400
36	Morrisons	Cribbs Causeway	Superstore	400
37	Hanson Quarry Products	Chipping Sodbury	Building Materials / Aggregates	400
38	Tesco Stores	Yate	Superstore	320
39	British Energy	Oldbury on Severn	Electricity Generation	350
40	The Environment Agency	Aztec West	Government Environmental Agency	350
41	Kleeneze Europe	Warmley	Home Products	400
42	Tulip Fresh Meats	Westerleigh	Meat Processing	300

Section 4

Selected Business News April 2005 – February 2007

(A fuller version is presented in Appendix 2)

June 2005

Western Approach, Severnside. Gazeley, the development arm of Asda Walmart, have bought the 50 acre Western Approach site from Redrow in a deal understood to be around £10 million. Gazeley have applied for permission to build two warehouses, one of 500,000 sq.ft and the other 340,000 sq.ft. The distribution park will now be branded G Park Bristol.

September 2005

RAC are to cut 200 jobs from their Bristol Call Centres and outsource the work to India. RAC employ 975 in Bristol of which 420 work in call centres, the remainder in administration and insurance.

November 2005

Airbus UK, Filton. South Gloucestershire Council have approved a £300 million redevelopment scheme which will safeguard 6,450 jobs on the site. The comprehensive scheme covers 48 hectares (115 acres) and includes new offices, production areas and research and development facilities.

December 2005

Rolls Royce are to start work in January on phase 2 of the major new building works at Patchway. Phase one, a facility for the manufacture of turbine blades and components, is already well under way. Redundant land south of Gypsy Patch Lane will be sold off for housing.

The Ministry of Defence have bought a 13 acre site at New Road, Stoke Gifford from the Bank of Ireland. The site includes an office building accommodating 350 staff employed by the Bank of Ireland/Bristol and West Building Society. Bank of Ireland staff will be moved in phases over 18 months to the UK headquarters at Temple Quay. The MoD is planning to bring together staff from the Defence Logistics Organisation and the Defence Procurement Agency to improve the effectiveness of support to the three armed services. The New Road site could accommodate up to 1500 MoD staff.

Filton Northfield. Bovis Homes and BAE Systems have submitted plans for 2,200 homes and new jobs on the 81 hectare (195 acre) site at Filton Northfield. Land has been set aside for employment close to the Filton runway for 66,000 sq. metres for warehousing and light industry and 1,500 sq. metres of office space.

January 2006

Morrisons have confirmed that they are to close their distribution depot at Cribbs Causeway with the loss of 640 jobs. The closure is the result of the Morrison takeover of Safeway which has left Morrison with too many distribution centres.

Bristol Zoo have outlined their plans for a new £50 million National Wildlife Conservation Park at Cribbs Causeway that should open in five years. The Conservation Park will need 600,000 visitors a year to pay its way. Funding is expected to come from Lottery funding, foundation trusts, private contributors and corporate sponsorship.

February 2006

Intier Automotive have announced that they are to close their vehicle trim factory at Bitton in August with the loss of 200 jobs. Production will be moved to a plant in Derby.

March 2006

B & Q, Cribbs Causeway. Up to 200 jobs will be created with the opening of the new B & Q DIY store at Cribbs Causeway. The current B & Q store at Cribbs Causeway will close with 52 staff transferring to the new store.

April 2006

Logistics company Gist have announced plans to create 150 jobs at their 100,000 sq.ft. depot in Thornbury. Gist will handle food deliveries for Marks and Spencers across the South West and South Wales.

SPark Science Park, Emersons Green. Quantum Property Partnership have been appointed as the private sector developer and funding partner on the first 54 acres of the Science Park. Quantum, a joint venture between Quintain Estates and Development, and Morley Fund Management will finance and develop roads, services and the first buildings. The site has planning permission for 77,000 sq metres of science and technology related space. Work is expected to start next year with buildings available in Spring 2008.

June 2006

Western Approach, Severnside. DSG International, who own electrical retailers Dixons and Currys, have opened a large distribution depot at Western Approach which will employ 120 permanent staff.

September 2006

Airbus UK have officially opened their new £70 million Wing Assembly Centre at Filton which will be used to build composite wings for the A400M military aircraft. The project will employ 900 at Filton.

November 2006

AXA Sun Life have announced plans to cut 200 jobs in Bristol and Coventry. AXA employ 2,700 staff in Bristol and 700 in Coventry. The Company has stated that the job cuts are required to control costs. AXA cut 350 from the two sites in March 2006.

February 2007

Kleeneze. Up to 300 workers at Kleeneze could lose their jobs with the decision by new owners Findel to relocate the company to Accrington in Lancashire. The Kleeneze site at Warmley employs 300 staff and houses a call centre, administrative centre and a 169,000 sq.ft. warehouse. Findel bought the company in October 2006 after Kleeneze's parent firm, European Home Retail, had gone into liquidation.

Airbus, Filton. Around 750 jobs at the Airbus plant will go over the next four years as part of the cost cutting programme of parent company EADS aimed at saving £1.3 billion a year: it is hoped that the jobs will be lost through natural wastage. Filton has been named by EADS as a second category site for which EADS intends to attract an outside third partner who will be invited to invest in and part purchase parts of the operation. A number of companies have already been mentioned as possible bidders for involvement at Filton including technology and engineering firm GKN. GKN is being lined up to invest £100 million in the Filton site to pay for a composite manufacturing facility – an area at Filton has been cleared for this facility. GKN already work as a supplier on the Airbus programme.

Section 5

Business Structure (VAT Registrations)

Table 7 : South Gloucestershire Business Structure (VAT Stocks) by industry 2001 - 2005			
Industry	2001	2003	2005
1 : Agriculture; Forestry and fishing)	425	425	410
2 : Mining and quarrying; Electricity, gas and water supply	10	5	5
3 : Manufacturing	570	555	540
4 : Construction	1,060	1,140	1,200
5 : Wholesale, retail and repairs	1,365	1,320	1,365
6 : Hotels and restaurants	315	335	355
7 : Transport, storage and communication	380	400	400
8 : Financial intermediation	60	65	65
9 : Real Estate, renting and business activities	1,910	2,045	2,145
10 : Public administration; Other community, social and personal services	440	430	410
11 : Education; health and social work	90	100	115
Total	6,625	6,820	7,010

The number of VAT registered businesses rose by almost 400 between 2001 and 2005 with much of this increase occurring in the business activities (+235) and construction (+140) sectors.

Section 6

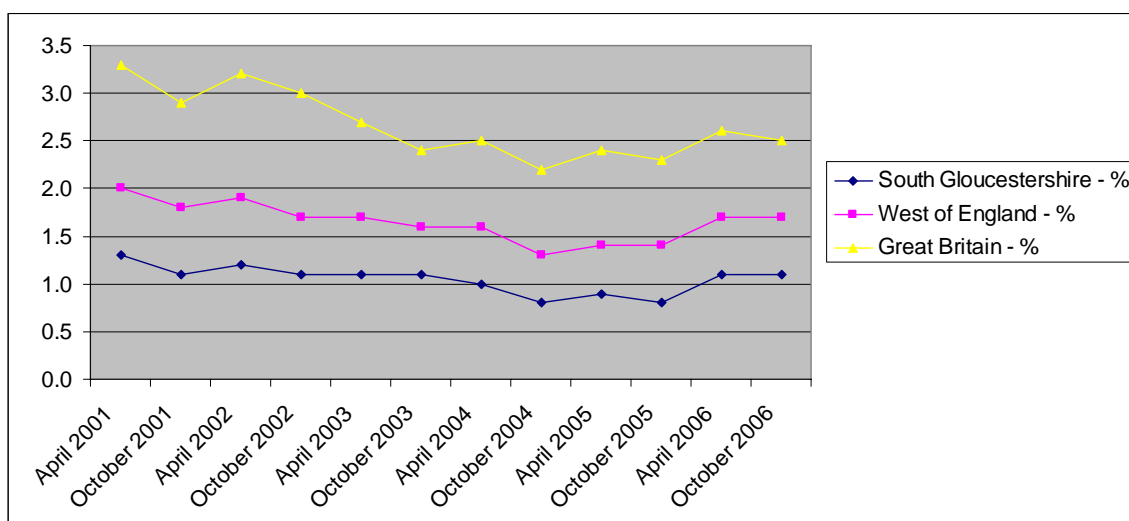
Unemployment in South Gloucestershire

The monthly claimant count is the most detailed and up to date source of unemployment data at the local level. The claimant count measures those claiming unemployment-related benefits (Job Seekers Allowance and National Insurance credits) at Employment Service local area offices on the count date, normally the second Thursday of the month.

Table 8 : Local, Regional and National Unemployment at January 2007

Area	male	%	female	%	total	%
Bath and North East Somerset	859	1.5	311	0.6	1,170	1.1
Bristol	4,809	3.5	1,705	1.3	6,514	2.5
North Somerset	1,047	1.8	401	0.7	1,448	1.3
South Gloucestershire	1,160	1.4	513	0.7	1,673	1.1
West of England	7,875	2.3	2,930	0.9	10,805	1.7
South West	36,699	2.3	14,264	1.0	50,963	1.7
England	590,066	3.6	214,517	1.4	804,583	2.6
Great Britain	691,187	3.7	247,438	1.4	938,625	2.6

Table 9: Unemployment Trends 2001 – 2006, South Gloucestershire, West of England and Great Britain



The level of unemployment in South Gloucestershire has fluctuated between 0.8% and 1.3% since 2001, well below the corresponding rates for the West of England and Great Britain. At October 2006 there were 1,750 people (claimants) out of work in South Gloucestershire.

The Annual Population Survey, a household survey that asks people whether they are seeking work, records a significantly higher level of unemployment than the official count. The April 2005 – March 2006 Survey recorded 4,500 unemployed in South Gloucestershire, a rate of 3.3% (Great Britain 5.1%, West of England 3.4%).

Table 10 : Unemployed Claimants by Ward - January 2007

1999 WARD	Males	Rate %	Females	Rate %	Total	Rate %
	Number	Ec Ac 16-74	Number	Ec Ac 16-74	Number	Ec Ac 16-74
Almondsbury	13	1.3	7	0.8	20	1.1
Alveston	12	1.5	3	0.5	15	1.1
Bitton	24	2.4	14	1.7	38	2.1
Boyd Valley	19	0.9	14	0.8	33	0.9
Bradley Stoke Baileys Court	7	0.5	10	0.8	17	0.6
Bradley Stoke Bowsland	15	0.5	16	0.7	31	0.6
Bradley Stoke Sherbourne	23	1.3	10	0.7	33	1.0
Charfield	13	1.0	#	#	14	0.7
Chipping Sodbury	14	0.7	16	1.0	30	0.9
Cotswold Edge	8	0.8	9	1.1	17	0.9
Dodington	31	1.3	16	0.8	47	1.1
Downend	46	1.7	13	0.6	59	1.2
Filton	68	2.5	24	1.1	92	1.9
Frampton Cotterell	27	1.6	10	0.7	37	1.2
Hanham	45	1.7	14	0.6	59	1.2
Kings Chase	102	3.6	34	1.4	136	2.6
Ladden Brook	12	1.1	#	#	13	0.7
Longwell Green	33	1.5	14	0.7	47	1.2
Oldland Common	29	1.4	16	0.9	45	1.2
Parkwall	47	2.1	26	1.3	73	1.7
Patchway	72	2.4	21	0.8	93	1.7
Pilning & Severn Beach	14	1.3	3	0.3	17	0.9
Rodway	63	2.4	28	1.2	91	1.8
Severn	6	0.6	4	0.5	10	0.5
Siston	61	1.4	27	0.8	88	1.1
Staple Hill	71	4.0	26	1.8	97	3.0
Stoke Gifford	46	1.4	21	0.7	67	1.1
Thornbury North	17	0.9	5	0.3	22	0.6
Thornbury South	23	1.3	9	0.6	32	0.9
Westerleigh	12	1.4	#	#	14	0.9
Winterbourne	20	0.8	21	1.0	41	0.9
Woodstock	75	2.4	27	1.0	102	1.7
Yate Central	34	1.7	16	1.0	50	1.4
Yate North	27	1.3	16	0.9	43	1.1
Yate West	31	1.6	19	1.1	50	1.4
Total	1160	1.6	513	0.9	1673	1.3

Source: Office for National Statistics (NOMIS) monthly count of unemployed claimants © Crown copyright.

Notes: Ward unemployment rates are not consistent with the official District unemployment rates.

These figures are suppressed as value is 1 or 2.

At January 2007 just one ward , Staple Hill, had an unemployment rate (3.0%) higher than the national rate which stood at 2.6%.

Section 7

Employment Rates

Table 11: Employment Rates, Working Age Population April 2005- March 2006

	South Gloucestershire	BANES	North Somerset	Bristol	West of England	Great Britain
Males	87.0%	80.0%	83.3%	78.8%	81.9%	78.5%
Females	80.4%	76.5%	76.1%	70.3%	75.0%	69.8%
Total	83.8%	78.3%	79.8%	74.7%	78.6%	74.3%

Source : Annual Population Survey

Male and female employment rates (the percentage of the working age population in employment) are significantly higher in South Gloucestershire than elsewhere in the West of England and almost 10% above national rates. The total employment rate for South Gloucestershire (83.8%) is well above the Government's national target which is set at 80%.

Section 8

Qualifications

The position in South Gloucestershire with regard to qualifications is that :-

- 31.5% of the economically population of South Gloucestershire have a qualification at NVQ level 4 – higher than Great Britain (30.2%) but significantly lower than the West of England (35.4%).
- 22.5 % of the economically active population of South Gloucestershire have either no qualifications or a qualification at NVQ level 1 – lower than Great Britain (24.1 %) but higher than the West of England (21.6%).
- An estimated 8,000 of the economically active population (134,000) of South Gloucestershire have no qualification.

Source : Annual Population Survey 2005

Section 9

Benefits Claimants (Working Age)

Table 12 : Claimant Rate Information, Unitary Authorities, December 2006

	All Claimants of Working Age	Total Claimant Rate	Sick and Disabled Claimants	Sick and Disabled Claimant rate
BANES	11,210	11.2%	6,145	6.2%
Bristol	44,790	19.0%	23,745	10.1%
North Somerset	15,865	15.0%	9,280	8.8%
South Gloucestershire	15,185	10.3%	8,315	5.7%

10.3% of working age people in South Gloucestershire claimed benefits at December 2006 – a total of 15,185 claimants from a population of 147,000: the sick and disabled claimant rate was 5.7%. The corresponding rates for Bristol and North Somerset were significantly higher.

Table 13 : Claimant Rate Trends, South Gloucestershire 2004 - 2006

	16 - 59 Pop	All Claimants	Unemp. Claimants	Sick and Disabled Claimants	Lone Parents	Total Claim Rate	Sick and Disabled Claim Rate
Sep-04	147,073	13,984	1,476	7,682	1,844	9.5%	5.2%
May-05	147,073	14,085	1,200	7,850	1,830	9.6%	5.3%
Oct-05	147,073	14,015	1,175	7,825	1,790	9.5%	5.3%
Apr-06	147,073	14,605	1,655	7,875	1,775	9.9%	5.4%
Sep-06	147,073	14,390	1,660	8,095	885	9.8%	5.5%
Dec-06	147,073	15,185	1,715	8,315	1,845	10.3%	5.7%

Table 13 indicates that the number of claimants, particularly sick and disabled claimants, has risen steadily in South Gloucestershire over the past two years.

Section 10

School Leavers

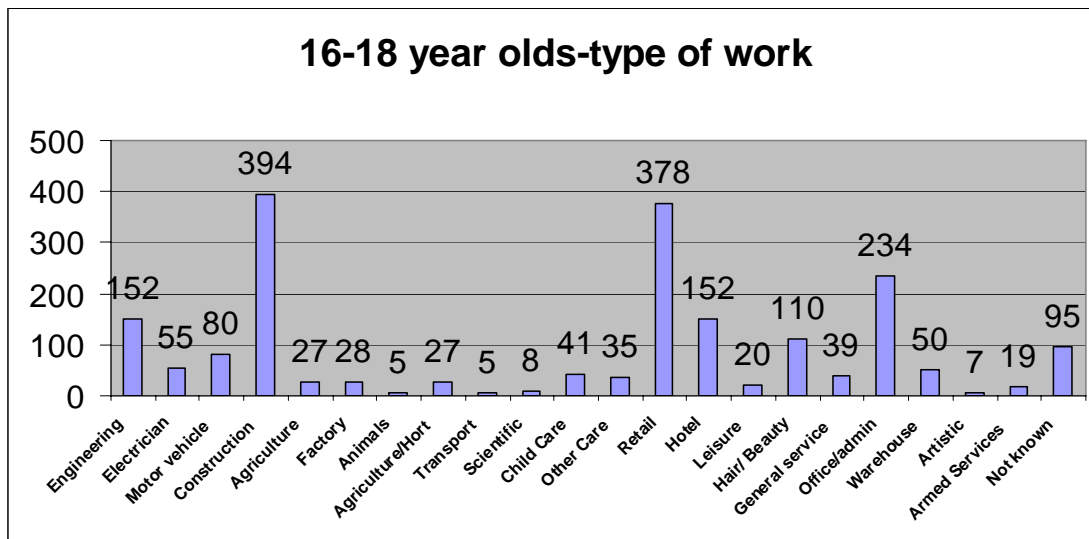
Table 14 : Destination of Year 11 School Leavers in South Gloucestershire

	South Gloucestershire 2003/4	South Gloucestershire 2004/5	South Gloucestershire 2005/6
Learning/employment with training	86.7%	89.6%	92.8%
Employment without training	4.7%	2.4%	2.3%
Not settled/not active	6.2%	5.8%	3.9%
Moved away	0.5%	0.9%	0.29%
No response/refused	1.9%	1.3%	0.61%

Source : Connexions West of England

Table 14 indicates that the number of school leavers going on to education / training / employment with training is rising from year to year.

Table 15: Types of Work taken by 16 – 18 year old Leavers from South Gloucestershire Schools



Source : Connexions West of England

Over 30% of 16 -18 year old students taking up employment work in construction and retailing with engineering, hotels and administration also being popular choices.

Table 16 : Types of Training places (Apprenticeships) being taken up by South Gloucestershire Young People

Accounting And Finance	4
Administration	56
Animal Care And Veterinary Science	4
Building And Construction	139
Child Development And Well Being	15
Engineering	118
Health And Social Care	2
Horticulture And Forestry	2
Hospitality And Catering	18
ICT for Users	8
ICT for Practitioners	3
Manufacturing Technologies	2
Media And Communication	1
Retailing And Wholesaling	6
Service Enterprises	94
Sport, Leisure And Recreation	9
Transportation Operations And Maintenance	96
Travel And Tourism	6
Unknown	71
Warehousing And Distribution	11

Source : Connexions West of England

Section 11

Major Development Areas

Aztec West Business Park, Almondsbury

Aztec West, covering 68 hectares, is located at the junction of the M5 motorway and the A38. The business park was laid out in the early 1980s and is now home to over 120 companies (7,000 jobs). Occupiers include The Royal Bank of Scotland, Orange, ST Microelectronics, The Environment Agency, Cornhill Direct and G E Capital Equipment Finance. One significant area remains to be developed - the Western Sector (5.6 hectares) which has planning permission for 28,500 sq metres of office floor space.

Bristol Business Park, Frenchay

The final phase of the 15 hectare business park commenced at the end of 2006 – two buildings (Buildings 620 and 630) will provide a total of 4,400 sq. metres of office space. Businesses located on the Business Park include Thales, Rolls Royce Marine Power and Systems Engineering and Assessment.

Western Approach Distribution Park, Severnside

The 87 hectare Western Approach Distribution Park was granted planning approval in 1995. Gazeley, the development arm of Asda Walmart, acquired Western Approach in June 2005. Occupiers include Constellation Europe, the Royal Mail, Next and DSG International. Approximately 20 hectares remain to be developed at January 2007: two new distribution warehouses (11,000 sq. metres and 19,000 sq. metres) were due for completion by September 2007.

Emerald Park, Emersons Green

Emerald Park, adjacent to the Avon Ring Road to the north east of Bristol, covers some 30 hectares. Sainsbury's occupy a 30,000 sq metres distribution depot on an 11 hectares site and a number of speculative industrial unit and office schemes have been completed in recent years. Companies at Emerald Park include Knorr Bremse, The Mitie Group and Inbis Engineering Consultants. At January 2007 approximately five hectares remain to be developed (Viceroy Gate).

Proposed Spark Science Park, Emersons Green

The proposed 25 hectare Spark Science Park adjacent to the Avon Ring Road at Emersons Green will provide 77,000 sq metres of accommodation in a variety of building sizes and specifications. The £300 million science park will be comparable in size and scope to the best in the UK including the Warwick and Cambridge science and technology parks. The Universities of Bath, Bristol and the West of England are key partners supporting this exciting new project.

Most of the site was acquired by the South West of England Regional Development Agency (SWERDA) in 2004. In April 2006 SWERDA appointed Quantum Property Partnership as the private sector developer and funding partner. Construction work is expected to start on site in Summer 2007 with the first buildings available for occupation in Spring 2008.

East Works Site, Patchway

ProLogis acquired the 26 hectare East Works site at Gipsy Patch Lane, Patchway from Rolls Royce in October 2006. The site, currently occupied by older industrial buildings, will be redeveloped for a mixed range of employment uses over the next three years.

APPENDIX 1A

JOB GAINS IN SOUTH GLOUCESTERSHIRE JANUARY 2004 – FEBRUARY 2007

Name of Company	Business Activity	Location	Est. Jobs Gained	Notes
Airbus UK	Aerospace – Wing Technology	Filton	1,900	Expansion
Air Tanker	Aerospace	Aztec West	50	New
DSTi Output	Mailing and Printing	Almondsbury Park	50	Expansion
Beetles UK	Vehicle Conversions	Yate	50	Expansion
Hanson Quarry Products	Building Materials	Chipping Sodbury	170	Expansion
First Quality / Kingsbake	Bakery	Yate	30	Expansion
Icera	Electronics	Aztec West	55	Expansion
Data Systems and Solutions	IT – Defence Sector	Stoke Gifford	50	Relocation
Apertio	Telecommunications / Software	Emersons Green	150	New
WS Atkins	Engineering Consultancy	Aztec West	150+	Expansion
Qinetiq	Defence Technology	Stoke Gifford	50	Expansion
Thales	Defence / Marine Consultants	Stoke Gifford	300+	Future Aircraft Carrier
Inbis Technology	Engineering Design Services	Emersons Green	50	Expansion
Co-operative Legal Services	Legal Services	Aztec West	150	Proposed
Commercial Vehicle Direct	Vehicle Insurance	Aust	100	Expansion
WNS Assistance	Motor Insurance	Aztec West	100	New
GE Capital Equipment Finance	Equipment Finance	Aztec West	400	Relocation from Bristol
Cornhill Direct	Insurance	Aztec West	50	Expansion
Morrisons	Distribution Depot	Yate	300	Relocation from Cribbs Causeway
Sheffield Insulation	Distribution Depot	Filton	50	New
Gist	Logistics Depot	Thornbury	150	Expansion
DSG International	Distribution Depot	Sevenside	120	Relocation from Yate
Constellation Europe	Distribution Depot	Sevenside	130	Expansion
TNT Express	Distribution Depot	Yate	50	Expansion
TNT Logistics	Distribution Depot	Patchway	75	Expansion
Interroute	Highways Maintenance	Aztec West	est. 80	New
John Lewis	Department Store	Cribbs Causeway	200	Expansion
Bristol Honda	Car Showroom	Cribbs Causeway	30	New
B&Q	DIY Store	Cribbs Causeway	150	New
Interroute	Highways	Aztec West	80	New

	Maintenance			
Ministry of Defence	Defence Logistics	Stoke Gifford	2,000	Proposed
The Environment Agency	Government Agency	Aztec West	50	
Filton College	College of Further Education	Filton	200	Expansion
University of the West of England	University	Frenchay	400+	Expansion
RAC	Motoring Organisation	Aztec West	300	Expansion
Mitie Group	Facilities Management	Emersons Green	100	Relocation from Wrington and South Bristol
Clarity Blue	Direct Marketing	Almondsbury Park	50	New
Interserve Engineering Services	Building Services Engineers	Stoke Gifford	40	Expansion
Bryan Brothers	Garage Services	Emersons Green	40	New

APPENDIX 1B

JOB LOSSES IN SOUTH GLOUCESTERSHIRE JANUARY 2004 – FEBRUARY 2007

Name of Company	Business Activity	Location	Est. Jobs Lost	Notes
Cedric Chivers	Bookbinders	Pucklechurch	25	Closure
Courtaulds Bodywear	Women's Clothes	Staple Hill	65	Used to employ 200+
Bousfield	Printing Inks	Warmley	100	Receivership
Rolls Royce	Military Jet Engines	Patchway	450	Includes closure of combustion systems department
Kerry Foods	Food Processing	Kingswood	65	The former Hibernia Factory
Intier Automotive	Car Interiors	Bitton	320	Closure / Jobs transferred to Derby
Rolls Royce Marine Division	Marine Engineering	Stoke Gifford / Patchway	80	Contraction
Lindman Doorsets	Door Manufacture	Warmley	70	Closure
TQF	Meat Processing	Yate	40	Administration
Alexandra Workwear	Workwear	Thornbury / Almondsbury Business Park	100	Transfer of production overseas
Tulip Fresh Meats	Meat Processing	Westerleigh	200	Contraction
Marigold Comasec	Rubber Gloves	Yate	80	Work transferred out of the UK
MBDA	Defence Systems	Filton	200	Contraction
Kleeneze	Household Products	Warmley	300	Work is being transferred to Accrington following a change in ownership
Airbus UK	Aerospace – Wing Technology	Filton	750 +	Jobs will be lost through natural wastage over 3 – 4 years
British Energy (Oldbury Power Station)	Electricity Generation	Oldbury	350	Proposed for closure 2009
Scotty / Motion Media	Video Conferencing	Aust	40 .	Relocation to Bracknell
Hewlett Packard	Computer Peripherals	Stoke Gifford	200 +	Contraction
Siemens Communications	Electronics	Almondsbury Business Park	50	Closure
Super H	Electronics	Aztec West	50	?
ST Microelectronics	Electronics	Aztec West	100	Contraction
Bull Information Systems	Computer Systems	Patchway	100	Closure
Broadgate	Marine Electronics	Almondsbury Business Park	50	Closure
Telewest Broadband / Virgin	Telecommunications	Aztec West	200	Contraction
AXA	Insurance	Almondsbury Business Park	200	Contraction / Jobs moved to India
HSBC	Banking Services	Aztec West	300	Closure
Claims Plus	Insurance	Stoke Gifford	75	Closure

Brit Insurance Sercives	Insurance	Stoke Gifford	30	Closure
Bristol and West Building Society	Financial Services	Stoke Gifford	300	Jobs transferred to new offices at Temple Quay in Bristol
Royal London Mutual Society	Insurance	Stoke Gifford	50	Closure
Orange	Telecommunications – Call Centre	Almondsbury Business Park	100 .	Contraction
Morrisons	Distribution Depot	Cribbs Causeway	700	Closure - some jobs transferred to Yate
Trade Team / Exel	Distribution Depot	Aztec West	70	Closure
Boots	Distribution Depot	Patchway	100	Proposed closure - 2009
Thorn Homeservice	Distribution Depot	Aztec West	140	Closure
DSG International	Distribution Depot	Yate	100	Relocation to Severnside
Harry Ramsden	Restaurant	Cribbs Causeway	110	Closure
Post Office Counters	Post Office Services – Regional Office	Aztec West	100	Closure
RAC	Motoring Organisation	Almondsbury Business Park / Aztec West	200	Work outsourced to India
Westbury Homes	House Builders	Aztec West	120	Relocation

SOUTH GLOUCESTERSHIRE BUSINESS NEWS

APRIL 2005 – FEBRUARY 2007

April 2005

Commercial Vehicle Direct employ 250 at their Aust headquarters. The commercial vehicle insurance company was founded in 2001.

June 2005

The Dixons Distribution Centre at Western Approach, Severnside will employ 200. The 350,000 sq.ft. centre is due to open in April 2006.

Western Approach, Severnside. Gazeley, the development arm of Asda Walmart, have bought the 50 acre Western Approach site from Redrow in a deal understood to be around £10 million. Gazeley have applied for permission to build two warehouses, one of 500,000 sq.ft and the other 340,000 sq.ft. The distribution park will now be branded G Park Bristol.

July 2005

Airbus. Development of the 26 acre site adjacent to the A38 will secure the long term future of the 6,500 workforce. The first building to be completed will be an assembly hall that will be used to build carbon fibre wings. Much of the site will be developed for campus style offices.

Rolls Royce have won a £48 million contract to maintain engines powering the RAF's fleet of Hercules planes. The contract will be managed at the Patchway base.

August 2005

Rolls Royce. More than 170 jobs will be lost at Patchway in the next year due to the closure of the Combustion Systems Department.

September 2005

DSTi Output have created 23 new jobs at their headquarters at Bristol Distribution Park, Bradley Stoke. The specialist mailing and printing company have recently invested £30 million in the latest printing technology and are looking to open a second site in 2006 which is expected to create 120 jobs. The company currently employ 200.

Bristol Business Park, Stoke Gifford. Approval has been granted for two office buildings which will complete the development of the business park. The £6.5 million scheme will provide 50,000 sq.ft. of space.

Kerry Foods, Kingswood. More than 65 staff will lose their jobs when Kerry Foods close their factory in December. Kerry Foods took over the factory from Hibernia Brands in January 2004 and indicated that they would close the factory when the lease expired.

RAC are to cut 200 jobs from their Bristol Call Centres and outsource the work to India. RAC employ 975 in Bristol of which 420 work in call centres, the remainder in administration and insurance.

October 2005

Airbus have announced the launch of their new long range A350 passenger jet. The high carbon wings for the A350 will be built at Airbus sites at Bristol and Broughton. The A350 will carry 250-300 passengers and provide a direct challenge to Boeing's 787 Dreamliner.

Rolls Royce are to cut up to 80 jobs in their marine division which employs about 375 in Patchway and Stoke Gifford. Staff affected include engineers, naval architects and project managers.

November 2005

Airbus UK, Filton. South Gloucestershire Council have approved a £300 million redevelopment scheme which will safeguard 6,450 jobs on the site. The comprehensive scheme covers 48 hectares (115 acres) and includes new offices, production areas and research and development facilities.

December 2005

Rolls Royce have won a £185 million contract to carry out RB199 engine maintenance work on a fleet of Tornado aircraft used by the Royal Air Force.

Rolls Royce are to start work in January on phase 2 of the major new building works at Patchway. Phase one – a facility for the manufacture of turbine blades and components is already well under way. Redundant land south of Gypsy Patch Lane will be sold off for housing.

The Ministry of Defence have bought a 13 acre site at New Road, Stoke Gifford from the Bank of Ireland. The site includes an office building accommodating 350 staff employed by the Bank of Ireland/Bristol and West Building Society. Bank of Ireland staff will be moved in phases over 18 months to the UK headquarters at Temple Quay. The MoD is planning to bring together staff from the Defence Logistics Organisation and the Defence Procurement Agency to improve the effectiveness of support to the three armed services. The New Road site could accommodate up to 1500 MoD staff.

Airbus has received orders from budget airline Easyjet for 20 A319 aircraft. The order takes total Airbus orders past 700 in 2005 – well above the previous sales record of 556 set in 1998. US rival Boeing have sold 870 planes in 2005.

Filton Northfield. Bovis Homes and BAE Systems have submitted plans for 2,200 homes and new jobs on the 81 hectare (195 acre) site at Filton Northfield. Land has been set aside for employment close to the Filton runway for 66,000 sq. metres for warehousing and light industry and 1,500 sq. metres of office space.

January 2006

Morrisons have confirmed that they are to close their distribution depot at Cribbs Causeway with the loss of 640 jobs. The closure is the result of the Morrison takeover of Safeway which has left Morrison with too many distribution centres.

Bristol Zoo have outlined their plans for a new £50 million National Wildlife Conservation Park at Cribbs Causeway that should open in five years. The Conservation Park will need 600,000 visitors a year to pay its way. Funding is expected to come from Lottery funding, foundation trusts, private contributors and corporate sponsorship.

Airbus have begun recruiting hundreds of engineers and other staff at their Filton plant to help meet the expanding order book for aircraft. The company is looking further afield to find staff. Redundant engineers from the MG Rover plant in Birmingham have been targeted: Airbus may set up a systems engineering centre in Birmingham. The Airbus workforce at Filton currently stands at 6,000.

February 2006

Intier Automotive have announced that they are to close their vehicle trim factory at Bitton in August with the loss of 200 jobs. Production will be moved to a plant in Derby.

BSM are relocating their call centre from Wakefield to the RAC offices at Bradley Stoke. BSM is part of the RAC which was acquired last year by Aviva. RAC employ 700 at their call centre operation at Bradley Stoke: 200 call centre jobs were transferred to India in December 2005.

March 2006

B & Q, Cribbs Causeway. Up to 200 jobs will be created with the opening of the new B & Q DIY store at Cribbs Causeway. The current B & Q store at Cribbs Causeway will close with 52 staff transferring to the new store.

Boots have announced plans to overhaul their warehousing operations which will involve the closure of the regional distribution depot at Britannia Road, Patchway in 2009. Boots hope to minimise the number of redundancies through staff turnover.

AXA are to cut 350 jobs in Bristol and Coventry under plans to reduce costs. AXA employ 2,730 in Bristol.

Sheffield Insulations has relocated from St. Anne's in Lancashire to a 66,000 sq.ft. regional distribution centre at North Bristol Distribution Park.

April 2006

Qinetiq are to double the space they occupy at Bristol Business Park. The defence technology and security company are to move to Building 240 (18,000 sq.ft.).

BAE Systems have announced that they are to sell their 20% stake in Airbus to Airbus partner EADS. This decision has raised fears about the future of the Airbus plants at Filton and Broughton. Airbus UK management have given assurances that jobs will be safe.

Logistics company Gist have announced plans to create 150 jobs at their 100,000 sq.ft. depot in Thornbury. Gist will handle food deliveries for Marks and Spencers across the South West and South Wales.

SPark Science Park, Emersons Green. Quantum Property Partnership have been appointed as the private sector developer and funding partner on the first 54 acres of the Science Park. Quantum, a joint venture between Quintain Estates and Development, and Morley Fund Management, will finance and develop roads, services and the first buildings. The site has planning permission for 77,000 sq metres of science and technology related space. Work is expected to start next year with buildings available in Spring 2008.

Kleeneze are looking for 40 new staff to work at their Warmley headquarters. Jobs are available in the sales, marketing and purchasing departments as well as the Contact Centre.

Co-operative Legal Services (CLS) are to create 150 jobs over five years with the setting up of a legal services division at Aztec West.

May 2006

Orange. Up to 400 local jobs could be at risk after parent company France Telecom announced it was cutting 15% of its UK workforce. Orange employ 2,400 in Bristol. The cuts result from France Telecom merging its mobile and broadband service into one operation.

June 2006

Severn View Industrial Park, Severnside. Terramond have let or sold all the plots at the Industrial Park which has been designed to attract industrial occupiers with 24 hour

operations. Occupiers including Wring Transport, Churngold Recycling, CPI Mortars, A K Butcher Transport, Glacier ARM and Calor Gas. Rates were achieved at over £350,000 an acre.

Western Approach, Severnside. DSG International, who own electrical retailers Dixons and Currys, have opened a large distribution depot at Western Approach which will employ 120 permanent staff.

Rolls Royce have won a £110 million contract to maintain engines that power the RAF's fleet of Hercules transport aircraft.

Cribbs Causeway Retail Park. Prudential and Capital Shopping Centres are to invest £4.8 million in refurbishing their 240,000 sq.ft. retail park. The refurbishment will involve re-cladding all elevations.

July 2006

Ministry of Defence. More than 2,000 jobs are set to move to Abbey Wood and Stoke Gifford as part of a major reorganisation. The Defence Procurement Agency is to merge with the Defence Logistics Organisation. DLO staff will move from elsewhere in the country to Abbey Wood and the former Bank of Ireland site at Bristol Parkway Business Park which has been acquired by the MoD.

August 2006

TQF of Yate have gone into administration resulting in 40 jobs being placed at risk. The meat company have lost a major contract and orders have fallen following the campaign for healthier school food.

Scotty, formerly Motion Media, have moved their HQ from Aust to Bracknell, bringing to an end the company's 13 year association with the area.

Rolls Royce. 400 jobs have been safeguarded at the Rolls Royce plant in Patchway after the UK agreed a £10 billion deal to supply Eurofighter jets to Saudi Arabia.

September 2006

Bristol Zoo have been refused a £25 million lottery grant for the planned National Wildlife Conservation Park at Cribbs Causeway. The money would have met half the cost of the eco-zoo which is due to open in five years. The Zoo will continue to look for funding for the project.

Airbus UK have officially opened their new £70 million Wing Assembly Centre at Filton which will be used to build composite wings for the A400M military aircraft. The project will employ 900 at Filton.

Brabazon Park, Golf Course Lane, Filton. The Brabazon Park Scheme will provide 42,000 sq.ft. of office space in units ranging from 1,800 to 5,000 sq.ft. The scheme is being developed by Terence Hill.

October 2006

Airbus. The A400M project, which employs 900 at Filton, could be affected by increasing costs and lengthy delays similar to those being experienced by the A380 super jumbo project.

Rolls Royce. The jobs of 50 staff at Rolls Royce have been secured for another year with Rolls Royce winning a £3.5 million extension to a major contract with the US Department of Defence. The contract is to maintain the F405 Adour engines used in the US Navy's 165 T-45 training aircraft.

November 2006

AXA Sun Life have announced plans to cut 200 jobs in Bristol and Coventry. AXA employ 2,700 staff in Bristol and 700 in Coventry. The Company has stated that the job cuts are required to control costs. AXA cut 350 from the two sites in March 2006.

Reliance Security group, currently based at Aust, have taken up the 14,500 sq.ft. Knowledge House office building at Patchway Industrial Estate formerly occupied by Synstar. The company employs 100 staff.

Bristol Business Park. Contractor Bluestone has won the £6 million contract for two office buildings at Bristol Business Park, one building of 33,200 sq.ft., the second 14,100 sq.ft. The development is the final phrase of the 38 acre office campus.

December 2006

Airbus. Parent company EADS has given approval to Airbus to develop the 300 seat A350 x WB airliner. There has been no immediate confirmation that the UK has retained its role as the Airbus Centre for wing design and manufacture but the early indications are positive.

Airbus. Singapore Airlines have placed an order for nine more A380 aircraft with options on a further six. The order is worth £1.37 billion. Airbus now has firm orders for 158 A380s; the break even sales point is 420.

Airbus. Australian Airline Qantas has ordered eight more A380 aircraft in a deal worth £1.22 billion

The Mall. Customers have spent £500 million at The Mall in 2006.

January 2007

Harry Ramsden's fish and chip restaurant at Cribbs Causeway is to close with the loss of 110 staff.

February 2007

Kleeneze. Up to 300 workers at Kleeneze could lose their jobs with the decision by new owners Findel to relocate the company to Accrington in Lancashire. The Kleeneze site at Warmley employs 300 staff and houses a call centre, administrative centre and a 169,000 sq.ft. warehouse. Findel bought the company in October 2006 after Kleeneze's parent firm, European Home Retail, had gone into liquidation.

Apertio now employ 150 staff at their headquarters in Emersons Green: two years ago the telecoms company employed 40 staff

Offices: North Fringe. New speculative office schemes are under construction at Bristol Business Park (44,000 sq.ft.) and Aztec West (60,000 sq.ft.). The traditional £2.00 per sq. ft. premium of city centre offices over out of town offices has leapt to £5.50.

Brooks Service Group. Ashley Vale and Aztec West. About 350 staff at dry cleaning firm Brooks Services group will lose their jobs after administrators failed to find a buyer for the company. Administrators have already sold off the workwear part of the business to Sunlight Service Group, safeguarding 70 jobs at the Aztec West Administrative HQ.

Airbus, Filton. Around 750 jobs at the Airbus plant will go over the next four years as part of the cost cutting programme of parent company EADS aimed at saving £1.3 billion a year.: it is hoped that the jobs will be lost through natural wastage. Filton has been named by EADS as a second category site for which EADS intends to attract an outside third partner who will be invited to invest in and part purchase parts of the operation. A number of companies have already been mentioned as possible bidders for involvement at Filton including technology and engineering firm GKN. GKN is being lined up to invest £100 million in the Filton site to pay for a composite manufacturing facility – an area at Filton has been cleared for this facility. GKN already work as a supplier on the Airbus programme.