



Department for
Business, Energy
& Industrial Strategy



Monthly Statistics of Building Materials and Components

Commentary

February 2019

Headline results	1
Important Notice	2
Introduction	2
Seasonal Adjustment Review	2
Summary of Results	3
Economic Background	10
Background Notes	14
Uses of the Data	16
Related Statistics	16
Revisions	17
Pre-release Access.....	17
Further Information	17

Coverage: UK and Great Britain
Geographical area: Country, region and
county
Date of publication: 6th March 2019

Headline results

Imports of construction materials **increased** by **5.8%** in 2018, reaching £18.1 billion. Over the same period **exports** of construction materials also **increased** by **5.8%**, totalling £7.6 billion

There was a **16.2% increase** in concrete block deliveries in January 2019 compared to January 2018, according to the seasonally adjusted figures

Important Notice

This publication is now published by the Department for Business, Energy and Industrial Strategy (BEIS). All references to the Department for Business, Innovation and Skills (BIS) made in this publication refer to when it was published by BIS. This has made no impact to the content of the publication.

The methodology for the sand and gravel estimates changed in Q1 2017. Please see the background notes for further details.

Introduction

This commentary accompanies the latest Monthly Statistics of Building Materials and Components bulletin, published on the BEIS building materials [web page](#) on 6th March 2019. It provides an overview of recent trends in the data presented in the bulletin.

The bulletin presents the latest detailed information on selected building materials and components. It covers the following building materials statistics (in parentheses, the data collection frequency and the geographical area covered):

- Construction material price indices (monthly, UK)
- Sand and gravel sales (quarterly, GB*)
- Slate production, deliveries and stocks (quarterly, GB)
- Cement and clinker production, deliveries and stocks (annual, GB)
- Bricks production, deliveries and stocks (monthly, GB*)
- Concrete building blocks production, deliveries and stocks (monthly, GB*)
- Concrete roofing tiles production, deliveries and stocks (quarterly, GB)
- Ready-mixed concrete deliveries (quarterly, UK)
- Values of overseas imports and exports trades for selected materials and components for use in construction (quarterly, UK)
- Value of EU and Non-EU Trade for selected materials and components for use in construction (annual, UK)

Note: * Regional figures available

These statistics support analysis of the construction materials market and business planning. They are regularly reported in the construction press and are used for a variety of purposes, including policy development and evaluation concerning the construction products industry, as well as monitoring market trends. Further detail is available in this document under [Uses of the data](#).

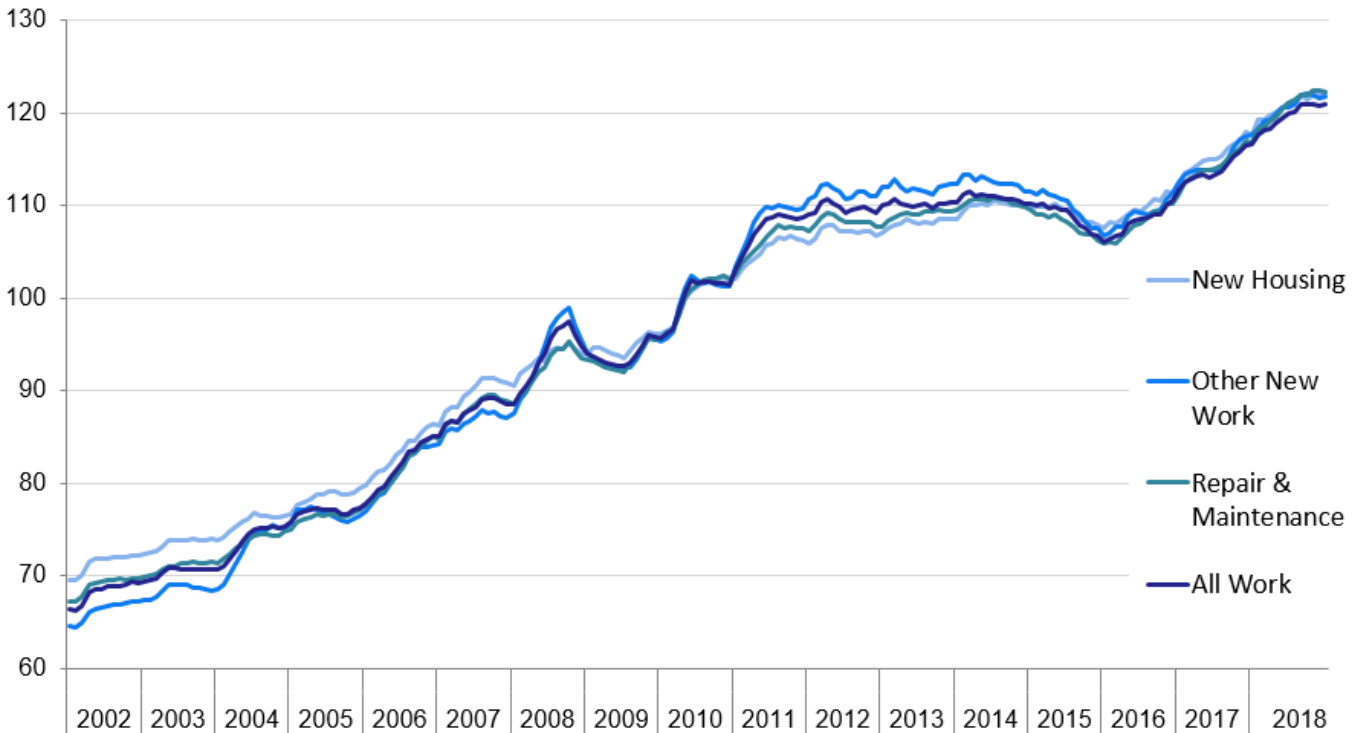
Seasonal Adjustment Review

Seasonally adjusted series for deliveries of bricks, concrete blocks, ready-mixed concrete and sales of sand & gravel are published in this bulletin. The purpose of correcting the reported series is to allow for seasonal factors such as winter weather (including the reduction in hours of daylight, and frost and rain) and other seasonal events such as Christmas and Easter. Thus, seasonally adjusted figures show the underlying trend more clearly. Further information can be found in Section 3 of the Background Notes on page 14 of this document.

Summary of Results

Material Price Indices

Chart 1: Construction Material Price Indices, UK*
Index, 2010 = 100



Source: Table 1, Monthly Statistics of Building Materials and Components

Year-on-year change

Change from January 2018 to January 2019	
New Housing	3.9%
Other New Work	3.5%
Repair & Maintenance	4.7%
All Work	3.8%

Month-on-month change

Change from December 2018 to January 2019	
New Housing	0.1%
Other New Work	0.1%
Repair & Maintenance	-0.1%
All Work	0.2%

Looking at the longer-term change, the material price index of **'All Work'** increased by **3.8%** in January 2019 compared to the same month in the previous year.

Table 1: Construction materials experiencing the greatest price increases and decreases in the 12 months to January 2019, UK

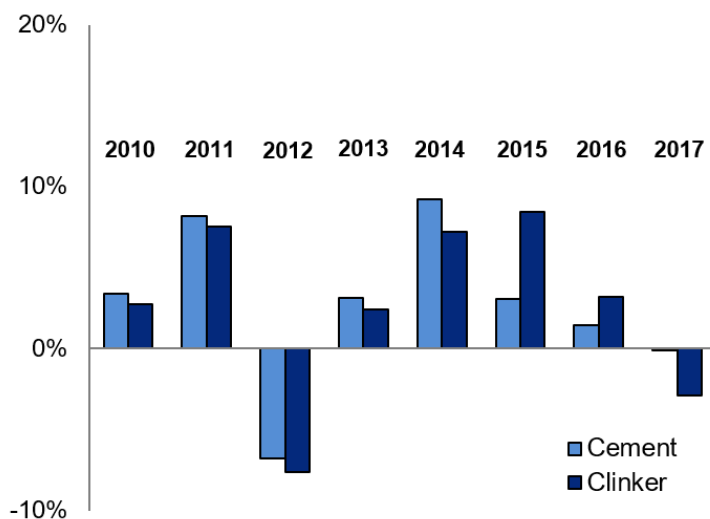
Construction Materials	% change on a year earlier
Greatest price increases	
Imported sawn or planed wood	9.4
Imported plywood	7.8
Pipes and fittings (rigid)	5.8
Greatest price decreases	
Concrete reinforcing bars	-1.7
Ceramic tiles	-0.1
Ready mixed concrete (excluding levy)	-0.1

The aggregated construction material price index hides larger price movements for some specific products and materials. The three largest increases and decreases are presented here.

Source: Table 2, Monthly Statistics of Building Materials and Components

Cement & Clinker

Chart 2: Production of Cement and Clinker, GB
Percentage change over previous year (%)



Cement production fell by 0.1% to 9.4 million tonnes in 2017, compared to the previous year. This fall in cement production follows growth of 1.5% to 9.4 million tonnes in 2016. Pre-recession production peaked in 2007 at 11.9 million tonnes.

Production of Clinker fell by 2.9% to 7.8 million tonnes in 2017, compared to the previous year. This fall in clinker production follows growth of 3.2% to 8.1 million tonnes in 2016. Pre-recession production, in 2007, stood at 10.2 million tonnes.

Source: Table 8, Monthly Statistics of Building Materials and Components

Sand & Gravel

Chart 3: Seasonally Adjusted Sales of Sand & Gravel, GB
Weight of sand & gravel



Source: Table 4, Monthly Statistics of Building Materials and Components

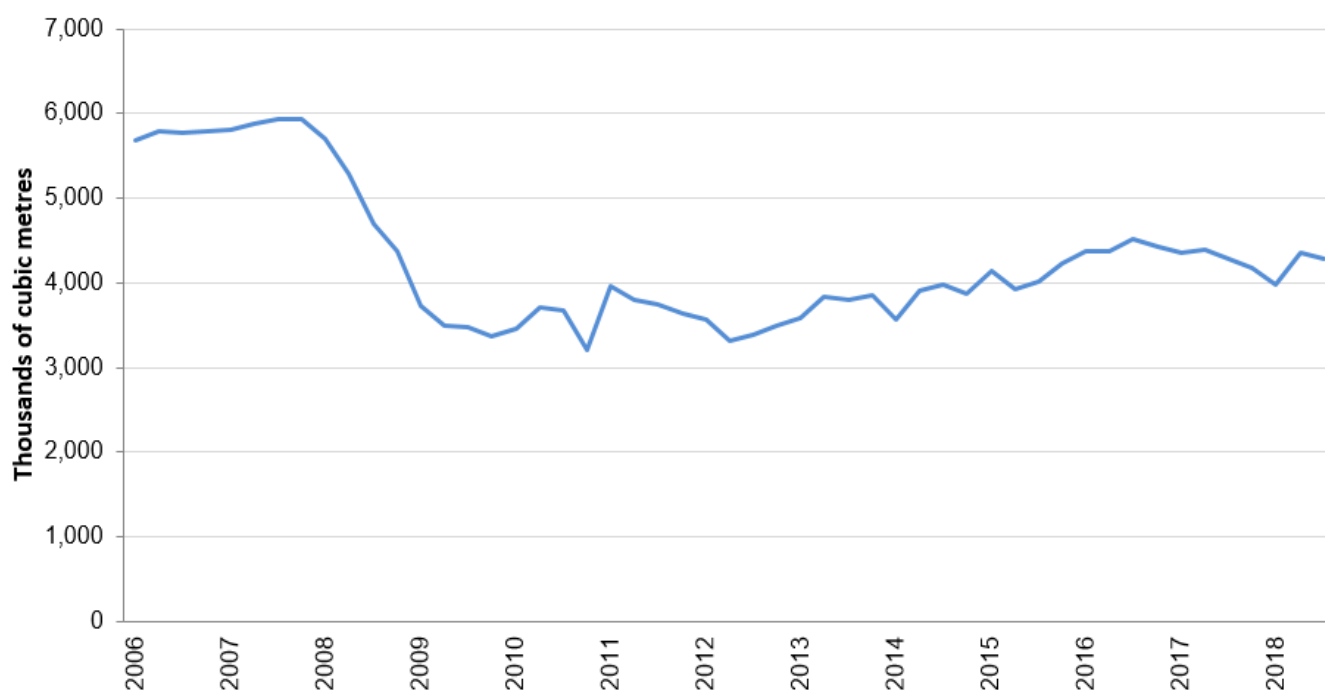
The methodology for the sand and gravel estimates has changed. Please see the background notes for further details.

- Sales of sand & gravel **decreased** by **6.8%** in Quarter 4 2018 compared to Quarter 3 2018, according to the seasonally adjusted data.
- This followed an increase of 5.1% in Quarter 3 2018.
- Comparing Quarter 4 2018 to the same quarter in the previous year, sales have **decreased** by 3.5%.

Seasonally adjusted sales of sand & gravel have consistently remained below levels typically seen before the recession of 2008 - 2009.

Concrete

Chart 4: Seasonally Adjusted Sales of Ready-Mixed Concrete, GB
Volume of concrete



Source: Table 13, Monthly Statistics of Building Materials and Components.

The data source for raw RMC has changed from 2016 Q1; these figures form the basis of the seasonally adjusted data.

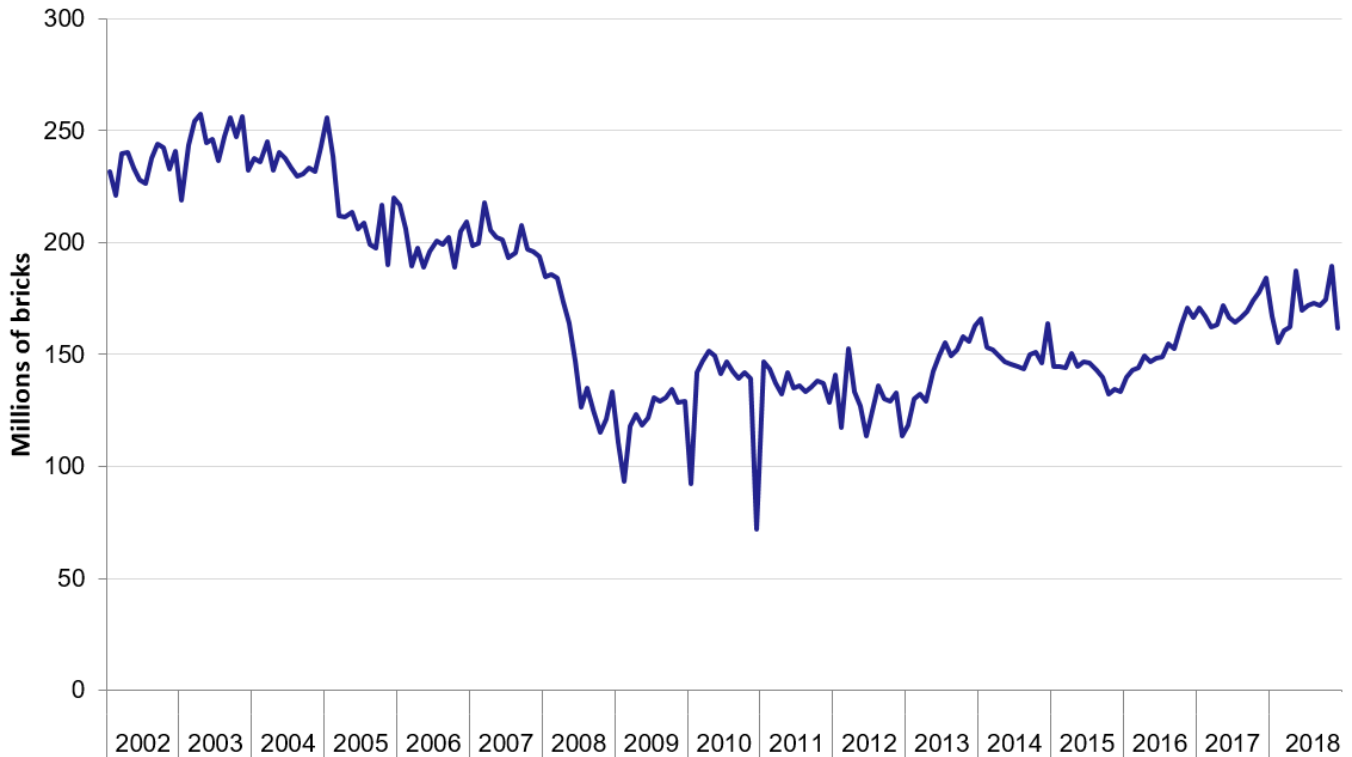
- Data for ready-mixed concrete in Quarter 4 of 2018 was not available at the time of publication.
- Ready-mixed concrete sales **decreased** by **1.5%** in Quarter 3 2018 compared to Quarter 2 2018, according to the seasonally adjusted data.
- This followed a **9.3% increase** in Quarter 2 2018.
- Sales in Quarter 3 2018 **increased** by **0.1%** compared to the same quarter in the previous year, following an **1.0% decrease** in Quarter 2 2018, on the same basis.

The seasonally adjusted data show that the lowest quarterly sales in the post-recession period occurred in Quarter 4 2010, which included extreme winter conditions.

Sales have steadily recovered since Quarter 2 2012, although they have failed to reach pre-recession levels.

Bricks

Chart 5: Seasonally Adjusted Deliveries of Bricks, GB
Number of bricks



Source: Table 9, Monthly Statistics of Building Materials and Components

- There was a **3.3% decrease** in brick deliveries in January 2019 compared to January 2018, according to the seasonally adjusted figures.
- This followed a 6.4% increase in December 2018, on the same basis.
- The month-on-month change shows a **14.8% decrease** in January 2019. This may reflect higher than normal deliveries of bricks in December.
- This followed an 8.7% increase in December 2018, on the same basis.

Deliveries of bricks declined during the recession of 2008 - 2009 and have recovered slowly since 2013.

Blocks

Chart 6: Seasonally Adjusted Deliveries of Concrete Blocks, GB
Area of concrete blocks



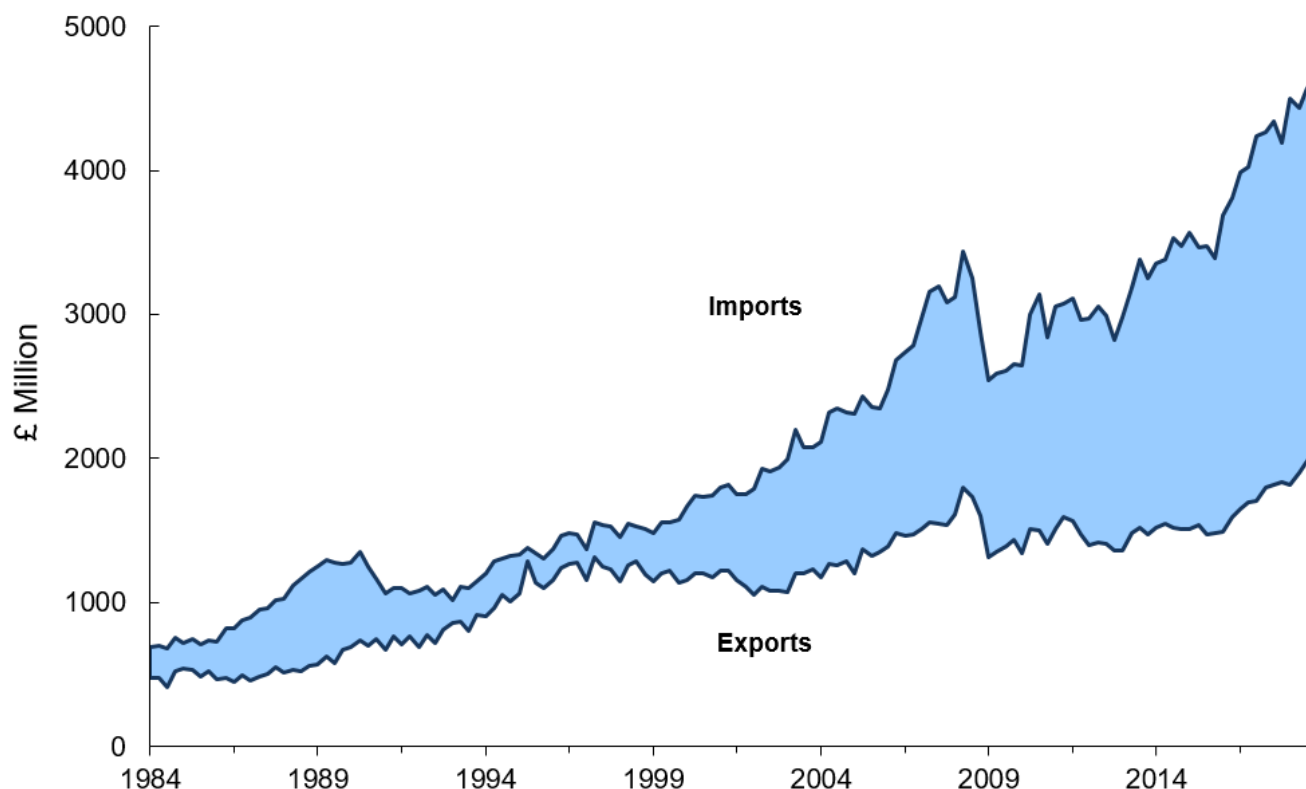
Source: Table 11, Monthly Statistics of Building Materials and Components

- There was an **16.2% increase** in concrete block deliveries in January 2019 compared to January 2018, according to the seasonally adjusted figures.
- This followed a 1.1% decrease in December 2018, on the same basis.
- The month-on-month change shows a **17.2% increase** in January 2019.
- This followed a 9.3% decrease in December 2018, on the same basis.

Concrete block deliveries declined during the recession of 2008 - 2009, though the general trend has been one of growth since 2013.

Imports and Exports of Construction Materials

Chart 7: Exports and Imports of Construction Materials, UK.
Value in pounds sterling



Source: Table 14, Monthly Statistics of Building Materials and Components

Imports of construction materials **decreased** by £8 million in the fourth quarter of 2018 (to £4,568 million) compared to the previous quarter, a decrease of 0.17%.

Exports of construction materials **decreased** by £121 million in the fourth quarter of 2018 (to £1,868 million), a 6.1% decrease.

As a result, the **trade deficit widened** by £113 million to £2,700 million in Quarter 4 2018, an increase of 4.4%.

Over the period from Quarter 1 1984 to Quarter 4 2018, construction materials imports have increased, on average (per quarter), by 4.0%. Over the same period, exports increased by an average of 2.1% per quarter.

The trade deficit was historically at its smallest throughout the 1990s, with a mean of £0.3 billion over this period. This trade deficit was 24% of the value of imports. As of Quarter 4 2018, the trade deficit is £2,550 million, 59% of the value of imports.

Table 2: Top-5 Exported and Imported Construction Materials in 2018

<i>£ million</i>			
Top-5 Exported Materials		Top-5 Imported Materials	
Electrical Wires	864	Electrical Wires	1,889
Paints & Varnishes	717	Lamps & Fittings	910
Plugs & Sockets	452	Sawn Wood > 6mm thick	883
Air Conditioning Equipment	402	Structural Units (steel)	785
Lamps & Fittings	387	Central Heating Boilers	665

The top five exported materials in 2018 accounted for 37% of total construction material exports.

The top five imported construction materials in 2018 accounted for 28% of total construction material imports.

Source: Table 14, Monthly Statistics of Building Materials and Components

Table 3: UK Trade of Construction Materials with EU and Non-EU Countries, 2018

<i>£million (% of total trade in italics)</i>			
All Building Materials & Components	EU	Non-EU	
Imports	11,250	6,828	
	<i>62%</i>	<i>38%</i>	
Exports	4,744	2,830	
	<i>63%</i>	<i>37%</i>	

Compared to pre-recession levels in 2007, the share of total UK construction material exports going to the EU has declined from 70% to 63%.

Source: Table 15 Monthly Statistics of Building Materials and Components

Table 4: Top 5 UK Export and Import Markets for Construction Materials in 2018

<i>£ million</i>			
Top-5 Export Markets		Top-5 Import Markets	
Republic of Ireland	1183	China	2831
Germany	800	Germany	2577
USA	642	Italy	1052
France	613	Spain	909
Netherlands	598	Netherlands	907

The top five export markets comprised 51% of total construction materials exports in 2018. The Republic of Ireland remains the largest market, despite having shrunk from a pre-recession peak of 27% of total exports in 2007, to 16% in 2018.

The top 5 import markets comprised 46% of total construction materials imports in 2018. 16% of all imports are from China.

Source: HMRC Overseas Trade Statistics

The '[Rotterdam Effect](#)' (also known as the '[Antwerp Effect](#)') may affect trade figures. This is explained in detail by [HM Revenue & Customs](#).

Economic Background

Construction Output

The most recent [construction output](#) figures for December 2018 were published by the **Office for National Statistics** on February 11th 2019.

Key points:

- The all work series decreased by 0.3% in Quarter 4 (Oct to Dec) 2018, following an increase of 2.1% in Quarter 3 (July to Sept) 2018; this decrease was driven by repair and maintenance output, down by 2.8%.
- The decrease in repair and maintenance was caused by drops in private housing and non-housing repair and maintenance output of 4.0% and 2.9% respectively.
- These falls were offset somewhat by a 1.1% increase in all new work, driven by increases of 1.9% in infrastructure and 1.4% in private commercial new work.
- The monthly series saw a sharper decline, with the all work series in December 2018 decreasing by 2.8% below the level seen in November 2018; this is the largest month-on-month fall in growth for all work since June 2012, when the series dropped by 4.3%.
- When compared with 2017, the level of all work in 2018 saw a 0.7% increase; this was the lowest annual growth since 2012, which saw a 6.9% decrease in annual output.

Bank of England Summary of Business Conditions

The **Bank of England** published its latest update to the [Agents' Summary of Business Conditions](#) on 20th December 2018, covering intelligence gathered between mid-October and late November 2018.

Key points:

- Growth in the value of retail sales weakened. Uncertainty related to Brexit and subdued housing market activity weighed on demand.
- Output growth in the construction sector remained modest. Following a period of strong growth, there was a slight slowdown in housebuilding activity in some parts of the UK. This was partially offset by stronger demand for refurbishment and improvement work in housing, and for private rental developments. Construction of private non-residential property slowed, especially of retail premises and offices. Growth in civil engineering and infrastructure work held broadly steady, but contacts said larger projects remained vulnerable to delays, and contacts were concerned that some projects might be scaled back.
- Investor demand for commercial real estate was concentrated in warehousing and distribution, and demand from foreign investors for developments in UK cities remained solid. Housing market activity weakened, partly due to increased uncertainty about the economic outlook.

Gross Domestic Product Estimate

The **Office for National Statistics** published the [monthly estimate](#) of gross domestic product for December 2018 on 11th February 2019. Further details of the new GDP publishing model can be found in the bulletin.

Key points:

- UK GDP grew by 0.2% in Quarter 4 2018 and by 1.4% in 2018, the lowest annual growth since 2012.

- The services industries grew by 0.4% in Quarter 4 2018. Construction fell by 0.3% in the same period, and the production industries fell by 1.1%.
- The month-on-month gross domestic product (GDP) growth rate was 0.2% in October, 0.2% in November, and -0.4% in December 2018.

Gross Domestic Product Forecast

The latest monthly **Consensus Economics** forecast survey (which uses an average of private sector forecasts) results were published on 11th February 2019.

Key points:

- The mean GDP for Q4 2018 was estimated at 1.4% and the GDP growth forecast for 2018 remains unchanged from last month.
- The mean GDP growth forecast for 2019 is 1.4% growth, down 0.1% from last month amid increasing uncertainties around Brexit.

The **Office for Budget Responsibility** published its most recent Economic and Fiscal Outlook on 29th October 2018.

Key point:

- The GDP growth forecast for 2018 was revised from 1.4% in November 2017 to 1.3%.

Construction Output Forecasts

In January 2019, **Experian** published their forecasts for the construction sector.

Key points:

- Output is expected to increase by 0.8% in 2018, 0.4% in 2019, 2.5% in 2020 and 3.1% in 2021.
- Private housing will slow down but continue to rise steadily through the forecast period. Public housing will fall in 2018 but then recover strongly over the next three years.
- The infrastructure sector is forecast to continue to recover from a 3.4% downturn in 2016, it grew 10.2% in 2017 and is forecast to grow by 5% in 2018, 8% in 2019 and 10% in 2020 and 6% in 2021. The infrastructure work is expected to move from energy and water & sewage, to transport and sewage, led by Highways England's road upgrades and Thames Tideway.
- Private commercial building grew by 7.5% in 2017 but is forecast to decrease by 5% in 2018, 9% in 2019 and 5% in 2020 before the decline is halted in 2021. In total the sector is forecast to fall nearly 18% between 2017 and 2021. This decrease is thought to be due to a more cautious attitude from investors and developers in light of the EU Referendum vote in June 2016.

The **Construction Products Association** published their Autumn forecasts for the construction sector in January 2019.

Key points:

- Overall, construction output is forecast to fall by 0.2% in 2018, downgraded from the Autumn forecast of +0.1%. The demise of Carillion and bad weather in Q1 2018 caused the loss of £1 billion of work. It is estimated that 60% of this work may be recovered, although work on two

major Carillion hospital projects is on hold until at least 2019. There have been declines in commercial offices and retail activity which counteracted significant growth in private housebuilding and infrastructure.

- In 2019, construction output is forecast to rise by 0.3%, reduced from 2.3% in the Summer forecast, as infrastructure projects and house building drive industry activity. Infrastructure is expected to reach the highest level on record in 2019 due to HS2, Thames Tideway and Hinkley Point C. Housebuilding activity is also expected to grow, encouraged by the extension of Help to Buy through to 2023.
- In 2020, construction output is forecast to rise by 1.6%. Growth in infrastructure is highly dependent on large projects such as HS2 and Hinkley Point C nuclear power station going ahead as planned, and there are some concerns due to the cancellation of the new nuclear power station at Wylfa and delays to Crossrail.

Manufacturing

The latest **Index of Production** data for October 2018 were published on 11th February 2019 by the Office for National Statistics.

Key points for the SIC 23.1-4/7-9 industry (includes the manufacture of bricks, tiles and other construction products):

- When comparing December 2018 with December 2017, **output increased by 1.4%**.
- When comparing December 2018 with November 2018, **output decreased by 36.9%**

Key points for the SIC 23.5-6 industry (includes the manufacture of concrete, cement and other products for construction purposes):

- When comparing December 2018 with December 2017, **output increased by 2.9%**.
- When comparing December 2018 with November 2018, **output decreased by 0.8%**.

Background Notes

Quality information for the Building Materials bulletin

1. The United Kingdom Statistics Authority has designated these statistics as National Statistics, in accordance with the Statistics and Registration Service Act 2007 and signifying compliance with the Code of Practice for Official Statistics.

Designation can be broadly interpreted to mean that the statistics:

- meet identified user needs;
- are well explained and readily accessible;
- are produced according to sound methods, and
- are managed impartially and objectively in the public interest.

Once statistics have been designated as National Statistics it is a statutory requirement that the Code of Practice shall continue to be observed. The full assessment [report](#), published on 22nd December 2011, can be found on the UK Statistics Authority website.

2. As of 3rd August 2016, this publication is published by the Department for Business, Energy and Industrial Strategy (BEIS). All references to the Department for Business, Innovation and Skills (BIS) made in this publication refer to when it was published by BIS. This has made no impact to the content of the publication.
3. In work done for BIS on improving the quality of statistics published in the Monthly Statistics of Building Materials and Components, the Office for National Statistics' Methodology Advisory Service (MAS) recommended that BIS should start seasonally adjusting key data series (see [ONS/MAS review of building materials statistics: final report](#) for more detail). Seasonal adjustment is widely used in official statistics and aids data interpretation by removing effects associated with the time of the year or arrangement of the calendar. Seasonal effects frequently obscure features of interest in data, such as long term trends and the effects of unusual occurrences. By removing seasonal effects, users can more readily identify the features of interest.

Following advice from the MAS, and the results of a consultation (see the [results of the BIS consultation on seasonal adjustment](#) for more detail), BIS agreed to publish seasonally adjusted data for the following series:

- Sand and gravel, total sales
- Concrete blocks, all types deliveries
- Bricks, all types deliveries
- Ready-mixed concrete, deliveries

For the initial publication of seasonally adjusted data, data from 1983 onwards will be seasonally adjusted. Subsequently, for each monthly publication, data up to 12 months or 4 quarters previous to the new data point will be revised. Upon the completion of each year's data series, data for the previous 12 years will be revised. BIS will publish both non-seasonally adjusted and seasonally adjusted data in the tables of this publication. From the June 2015

Edition this publication will only use seasonally adjusted data in the commentary for these series.

- Quality issues related to the *Building Materials and Components* outputs are discussed in the review of the Building Material statistics that was carried out in 2010 by BIS's construction team. The review aimed to: ascertain user needs; examine whether existing data collection methodologies are fit for purpose; estimate compliance costs; assess compliance with the Code of Practice; and identify options for change.

The full [report](#) can be found on the BIS *Building Materials and Components* webpage.

Detailed information on data suppliers, coverage and data collection methodology can be found in sections 2.1-2.10. Quality issues (coverage and accuracy of sample panels, response rates, survey results processing, disclosure etc.) and potential measures that could be employed to improve the quality of the statistics are discussed in section 2.11 of the review. Users' views on the quality of the *Building Materials and Components* statistics are given in section 3.3.4. These are derived from a user survey carried out in early 2010, as part of the review (see section 3 for details).

- Following the review, BIS acted on the recommendations including commissioning the Office for National Statistics Methodology Advisory Service (ONS/MAS) to address some of the recommendations from the 2010 review. In July 2011, MAS published their [interim report](#). In July 2012, MAS published their [final report](#).
- HM Revenue and Customs use administrative sources to produce Overseas Trade Statistics. A [Statement of Administrative Sources](#) used to compile construction material trade statistics is available on the BIS *Building Materials and Components* webpage:

Separately, HM Revenue and Customs also have a [Statement of Administrative Sources](#) which covers Overseas Trade Statistics.

- [The pre-announcement of any major changes to samples or methodology](#) also details some methodological changes to the collection of data.
- The following table gives a summary of response rates related to some of the latest survey results. Where the response rate is less than 100%, estimates are made for missing values.

For latest data used	Bulletin table number	Response rate
Quarterly Sand and Gravel	4, 5 & 6	88%
Quarterly Sand and Gravel – Land Won	4, 5 & 6	74%
Quarterly Sand and Gravel – Marine Dredged	4, 5 & 6	93%
Quarterly Slate	7	100%
Quarterly Concrete Roofing Tiles	13	100%
Monthly Bricks Provisional data	9	100%
Monthly Bricks Final data	9 & 10	100%
Monthly Concrete Blocks	11	91%

- Change to the methodology for the land-won sand and gravel surveys. Previously we have used information from the Annual Minerals Raised Inquiry (AMRI) run by the Department for Communities and Local Government (now the Ministry for Housing, Communities and Local

Government) in order to select the sample of sites which received the land-won sand and gravel survey and to weight the results to reflect the population. MHCLG no longer run AMRI, and so we have had to make changes to the sand and gravel surveys, which took effect from Q1 2017. The changes are:

- We have changed the survey from a sample to a census, so that we now send forms to all sites identified as producing sand and/or gravel. This has increased our panel from about 200 sites to around 500, and means that we will no longer need to weight the returns. We will still need to impute for any non-response.
- We refreshed our panel of sites using information from the British Geological Survey, ensuring that it was up-to-date.
- We made the survey statutory, bringing it into line with the marine-dredged sand and gravel survey which was already statutory. This means that respondents are required to complete the survey under the Statistics of Trade Act 1947.

Uses of the data

10. The *Building Materials and Components* statistics are used for a variety of purposes, including policy development and evaluation concerning the construction products industry, as well as monitoring market trends. In a wider context, the figures are regularly reported in the construction press to facilitate market analysis and business planning for its wide range of readers. The statistics are also increasingly used by financial institutions for assessing market information and industry trends. For more information on the uses of the Building Materials statistics, their usefulness to users and users' views on the quality of these statistics, see Section 3 of the *Building Materials and Components* [review](#).

Related Statistics

11. [Construction Statistics: Sources and Outputs](#) lists the known sources of information available on the construction industry and their outputs. These include information on employees, employment, enterprises, output and new orders in the construction industry as well as the contribution of the industry to the economy. Related information, for example housing, is also included.
12. The [Construction Statistics Annual](#) brings together a wide range of statistics currently available on the construction industry from a variety of sources and provides a broad perspective on statistical trends in the construction industry, with some international comparisons.
13. In its monthly **Index of Production (IoP)** [publication](#), the Office for National Statistics publishes Gross Value Added (seasonally adjusted, UK) data for the following two industries:
 - SIC 23.1-4/7-9 industry, which includes the manufacture of bricks, tiles and other construction products.
 - SIC 23.5-6 industry, which includes the manufacture of concrete, cement and other products for construction purposes.

These data are not directly comparable with the data in this bulletin, due to differences in coverage and methodology. They are nevertheless useful in illustrating the latest output trends of related construction materials as measured by the Office for National Statistics.

Revisions

14. Our [revisions policy](#) can be found on the BEIS Building Materials webpage.
15. [The pre-announcement of any major changes to samples or methodology](#) and [Summary of Revisions](#) give further information on revisions and other changes to data and can also be found on the BEIS Building Materials webpage.

Pre-release access

16. No [pre-release access](#) is granted to this publication.

Further information

The coverage of cement and cementitious statistics changed from UK to GB in 2002 due to data confidentiality issues in Northern Ireland as the number of manufacturers decreased. Where the coverage of figures for other building materials is limited to Great Britain (i.e. sales of sand and gravel, and production, deliveries and stocks of slate, clinker, bricks, concrete building blocks and concrete roofing tiles), no equivalent data are collected for Northern Ireland.

The most recently published bulletin and accompanying data tables can be found on BIS' *Building Materials and Components* [website](#).

Accompanying tables with data relating to 2011 are accessible from [this](#) link.

Accompanying tables for 2005 - 2010 are accessible from [this](#) link.

Requests for older data should be sent to MaterialStats@beis.gov.uk.

Please send us any comments or feedback you may have about this commentary.

Next publication: 3rd April 2019

Statistical Contact: Frances Pottier
Tel: +44 (0)207 215 1953
Email: MaterialStats@beis.gov.uk

Website: [Building Materials Construction Statistics](#), part of the [Business, Energy and Industrial Strategy](#) website.



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Contact us if you have any enquiries about this publication, including requests for alternative formats, at:

Department for Business, Energy and Industrial Strategy
1 Victoria Street
London SW1H 0ET
Tel: 020 7215 1953

Email: MaterialStats@beis.gov.uk

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