ECONOMIC DEVELOPMENT & TRANSPORT COMMITTEE

Date: 26 May 2005
Time: 9.30 - 12:30
Venue: Ladywell House, Newtown
Title: Mid Wales Manufacturing Group

Paper Presented to the Economic Development and Transport Committee of the National Assembly of Wales.

Thursday 26 May 2005

The Mid Wales Manufacturing Group

The Group's membership is typically 180 companies based in the Mid Wales area. These companies employ on average 42 staff although a significant number (12%) employ over 100. The Group has been in existence for approximately 12 years and provides a range of products / services for its members, the main ones being involved in the sharing of information between members on best practice and networking between companies encouraging local supply chain development. The Group is owned by its member companies and operates on a 'not for profit' basis receiving funds from a number of sources, principally the Welsh Development Agency and Europe through social and regional development projects.

The National Picture

The following is taken from the 'CBI Response to the Welsh Affairs Committee Inquiry into Manufacturing and Trade in Wales, 2003':

"Manufacturing in Wales directly accounts for 24.6% of Welsh GDP (UK – 18.8%, Scotland 18.8%) (Source: National Assembly for Wales – Statistics Wales). The annual value of Welsh manufactured goods exports in 2002 was £4.2 billion – 72% of total exports (UK – 60%) (Source: HM Customs and Excise UK Regional Trade in Goods Statistics: 17.07.2003)

Manufacturing is the highest value added sector in the economy – some 33% higher than services, and 15% higher than the average of all sectors. It remains a significant contributor to UK employment, generating direct employment of around 3.8 million people. Manufacturing in Wales directly accounts for 179,000 jobs – 16.8 % of total employment (March 2003), and almost as many again in dependant industries.

The success of inward investment into Wales twenty to thirty years ago means that a number of manufacturing operations are now requiring significant reinvestment, for example in new factories and new systems of production. There is a definite need for reinvestment in companies – though this factor can often be a catalyst for closure for some when such capital is unavailable here, or more attractive help with capital investment present themselves elsewhere. Government agencies need to ensure that as much priority is given to the current stock of businesses as to attracting new companies whether through foreign direct investment or start up programmes.

Government in Wales at all levels should not take existing companies for granted – if they are not supported to reinvest, by the creation of a competitive manufacturing environment and direct grant aid where appropriate, many will not be able to maintain their presence in Wales".

Many of the manufacturing companies currently based in Mid Wales are not indigenous businesses, but located here in the past as a result of successful Government intervention. They therefore have the potential to relocate again if business pressure coupled with poor infrastructure make the relocation commercially advantageous.

"A reliable, efficient and well-maintained transport infrastructure is essential to underpin a competitive manufacturing base. The ability of industry in Wales to develop and sustain a competitive manufacturing base depends heavily on the quality of its infrastructure. Efficient transport links ensure timely arrival of goods to market and staff to work."

The Group endorses the views of the CBI and would stress in recent years the effect of global competition coupled with steeply rising costs of many raw material commodities and fuel have resulted in more off shore sourcing of manufacturing capacity. Increasingly companies in Mid Wales are looking to the Far East in sourcing both components and finished assemblies. This is the inevitable result of the Far East labour cost differential coupled with almost full employment in the local labour market making expansion difficult.

The Mid Wales Picture

Manufacturing in Mid Wales represents a significant part of the economy with 6% of employee jobs in manufacturing in Ceredigion and 15% in Powys (Source: National Assembly for Wales – Statistics Wales). It is widely accepted that an equal number of jobs will result in direct services to the industry. Reliable statistics for the contribution manufacturing makes to the local economy are hard to define, but we conclude from various Government published statistics that manufacturing contributes in excess of 20% of Mid Wales GDP.

The Group conducts an annual survey of its member companies and the results relating to company performance are attached as an appendix. Key points are as follows:

- 62.7% of companies had experienced growth in the last year. This is the third consecutive year that the majority of companies surveyed have responded positively; however there is a significant reduction on last years figure of 81.8%.
- The three main barriers to growth were stated as available staff, finance and physical infra structure. Issues relating to finding suitable staff and the provision of infra structure (transport and premises) have featured as significant barriers for the last three years.

Manufacturing companies in Mid Wales have generally been less susceptible to the decline experienced in the industry elsewhere. This in part is due to the diverse nature of the industry in the region with no key sector dominating. However, these companies are not immune to global pressures and recent months have seen an alarming number of job losses in the Severn Valley.

It is however, worth noting that despite the high number of redundancies little increase (short or long term) has been seen in the unemployment statistics, this further supports the view of a tight labour market with companies competing to find staff. Anecdotal evidence is growing of an increasing number of European migrants finding work in Mid Wales manufacturing companies. The work done by the Mid Wales Partnership in it's 2003 Employers Needs Study which interviewed over 400 employers found 'Mid Wales suffers from two key recruitment issues – a shortage of workers (i.e. a labour shortage) and a shortage of certain skills – especially at craft level.'

Little has changed since this survey was conducted and it is particularly disappointing to note that in ELWa's Regional Statement of Needs and Priorities 2005 – 2006 the skills needs of manufacturing companies have hardly been recognised with the construction and care sectors identified as priorities. With no provision of local learning opportunities companies face few choices: recruiting and relocating suitable staff from outside Mid Wales (at high cost), sending staff considerable distances for training (often totally impractical) or most commonly 'making do'. Clearly the latter is unacceptable as it will eventually result in business decline as companies fail to embrace best practice and become uncompetitive.

The recently announced relocation of approximately 450 public sector jobs to Aberystwyth is undoubtedly a long term benefit to the Mid Wales economy, benefiting the service sector and eventual infra structure development. However, the short to medium term effect is likely to put further pressure on the tight labour market which will have a further impact on manufacturing competitiveness.

Transport infrastructure, particularly by road is an increasing concern. The general increase in vehicular traffic, coupled with traffic calming measures in communities on major access routes is significantly increasing journey times to work and market. Increasing fuel costs and recent legislation on driver hours will further increase the cost of access to Mid Wales businesses. Of particular importance to the Mid Wales economy is the east – west links to the UK motorway network as well as the north – south routes through Wales and onward to other parts of the UK.
Some of the Mid Wales lager towns (Welshpool, Newtown, Aberystwyth and Llandrindod Wells) are situated on the rail network. Little advantage is currently felt by business as no freight is carried and times / frequency of passenger services do not make the train a viable option for travel to / from work. The Group sees an important opportunity to develop the frequency and type of rail transport to enhance business access and relieve road congestion. The Group notes that some limited, but apparently successful trials are taking place moving timber by rail.
It is the Group's belief that effective Mid Wales transport infra structure can be typified in the location of Welshpool and the provision of its bypass. In recent years we have seen an expanding business base and a very high level of occupancy on the enlarged industrial estates. The occupying businesses benefit from easy access out of Welshpool and relatively easier journeys to the West Midlands and the North West. This is in sharp contrast to Newtown where access to industrial estates is through the town and time consuming

The Newtown Picture

Despite the recent job losses there has been no significant increase in unemployment, with other local companies recruiting, although not always at the same level of skill or pay. However, Newtown is not the booming manufacturing centre it once was. Few new industrial units have been built in recent years and a significant number of older ones are vacant. The Group estimates that 29% of industrial units on the business parks in the town are currently not in productive use. These are mainly the smaller 'start up' units which indicates little new growth is taking place in the town. Investment is desperately needed and ways must be found to encourage new and existing businesses to expand coupled with attracting new businesses into the area.

The impact of the poor road infrastructure is clearly experienced by a number of Newtown companies, particularly those on the western industrial estate. The Group believes the implementation of an effective Newtown bypass will have a similar effect of rejuvenating all the industrial estates as evidenced in Welshpool.

One particular issue that has been felt in Newtown is the effect of Government legislation on the provision of nursery care, with two nurseries having to close. This has resulted in further strain on business and staff trying to make a work – life / child care balance.

Conclusion

Manufacturing in Mid Wales employs a high number of people and makes a significant contribution to the regional economy. Manufacturing companies in the region are no different to those in the rest of Wales or the UK in terms of the commercial pressures they face and resources they require. Collectively the industry has a diverse sector base and overall has not yet been a victim of major decline. However, many communities are heavily dependant on one or two large employers and any decline experienced by those employers does have a dramatic effect on those communities.

As global competition increases the pressure to improve business efficiency builds and the requirement for skilled staff and effective infrastructure becomes essential. The Mid Wales Manufacturing Group urges the National Assembly for Wales to provide relevant and effective support for manufacturing business to develop. Specifically the Mid Wales manufacturing economy requires assistance in the provision of suitably trained and qualified staff, incentives to invest in business expansion and an efficient transport infra structure to ensure timely delivery of goods to market and people to work.

In summary, specific actions for Mid Wales and Newtown:

- Refocus ELWa' Regional Statement of Needs and Priorities on providing skills solutions for manufacturing business.
- Focused public investment to facilitate the expansion of indigenous business coupled with inward investment.
- Improve road infrastructure to enable faster journey times on the main E-W and N-S routes.
- Build the proposed Newtown by-pass.

- Increase the frequency of passenger rail services to enable commuting to / from work and encourage further movement of freight by rail.
- Support the establishment of child care facilities.

MWMG Annual Survey of Members – 2004

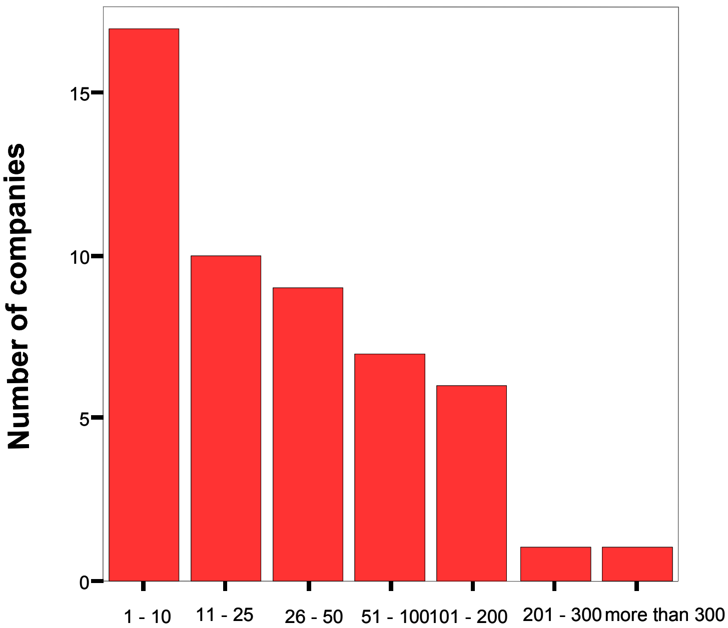
General company data

How many people does the company employ full-time?

	N	Mean	Std. Deviation	Minimum	Maximum	Sum
Full time staff	51	48.59	69.973	1	340	2478

Ranges of FT staff employed	Frequency	Percent
1 - 10 full-time staff	17	33.3%
11 - 25 full-time staff	10	19.6%
26 - 50 full-time staff	9	17.6%
51 - 100 full-time staff	7	13.7%
101 - 200 full-time staff	6	11.8%
201 - 300 full-time staff	1	2.0%
more than 300 full-time staff	1	2.0%

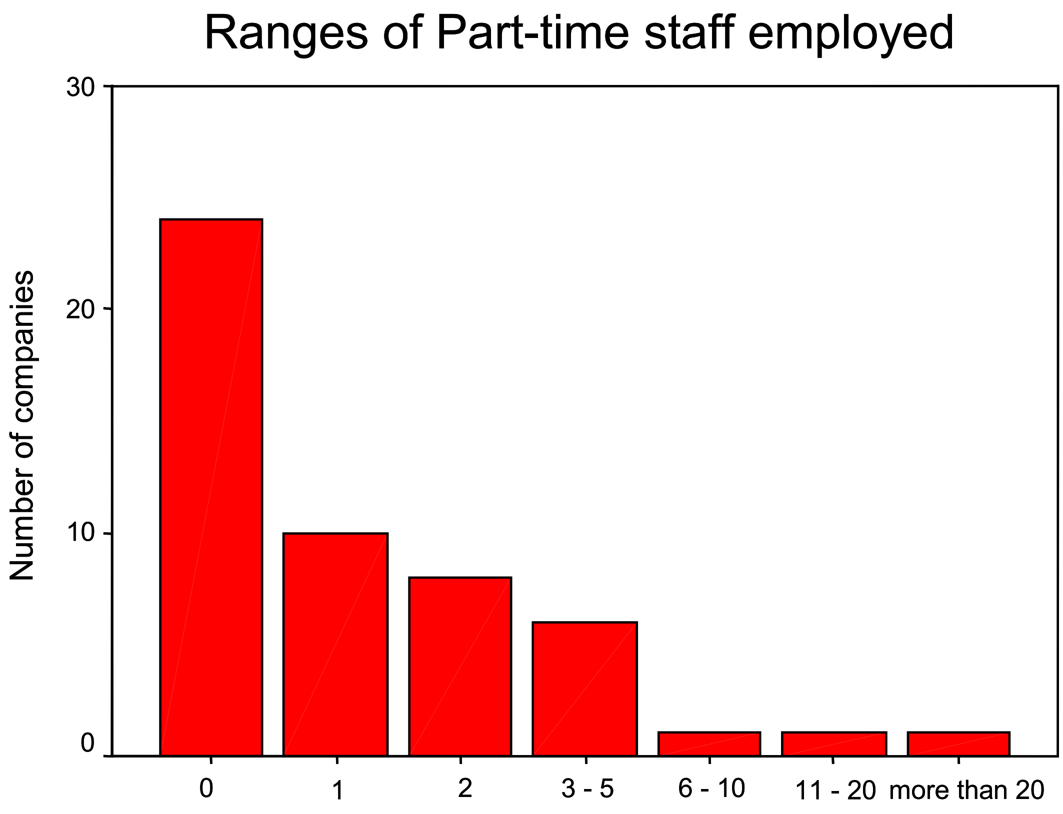
Ranges of full-time staff employed



How many people does the company employ part-time?

	N	Minimum	Mean	Maximum	Sum
Part time staff	48	0	2.06	24	99

Ranges of part-time employees	**Frequency**	**Percent**
No part-time staff	24	47.1
1 part-time staff member	10	19.6
2 part-time staff members	8	15.7
3 - 5 part-time staff members	6	11.8
6 - 10 part-time staff members	1	2.0
11 - 20 part-time staff members	1	2.0
more than 20 part-time staff members	1	2.0
Total	51	100.0



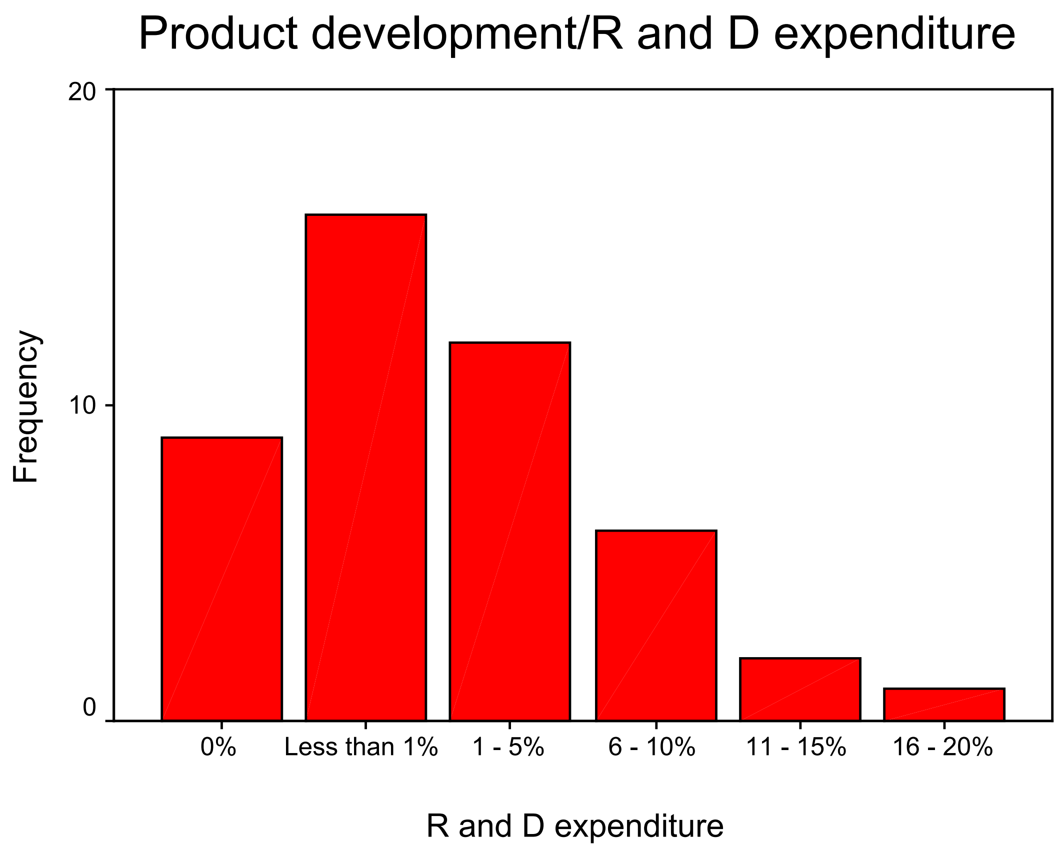
Financial Data

What was your approximate turnover in the last full financial year £(000)s?

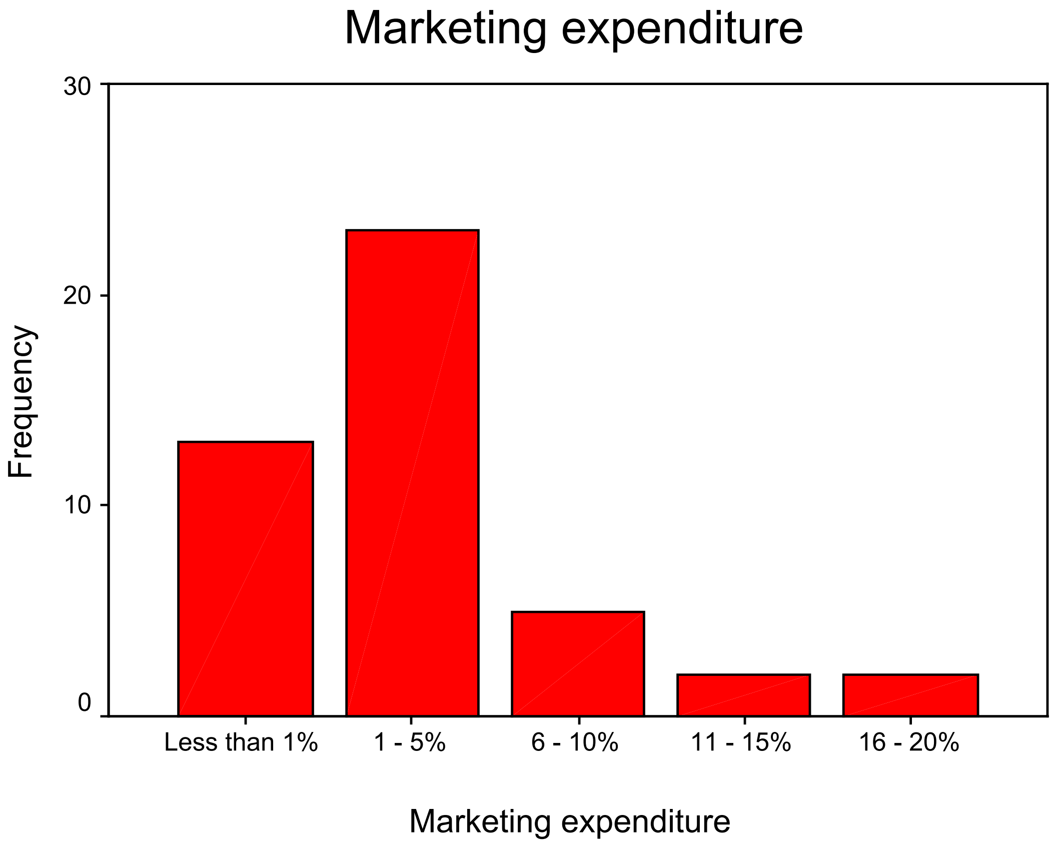
	N	Minimum	Maximum	Mean	Std. Deviation
Sales turnover	47	15	21000	3414.13	4638.7

Proportion of total expenditure taken by

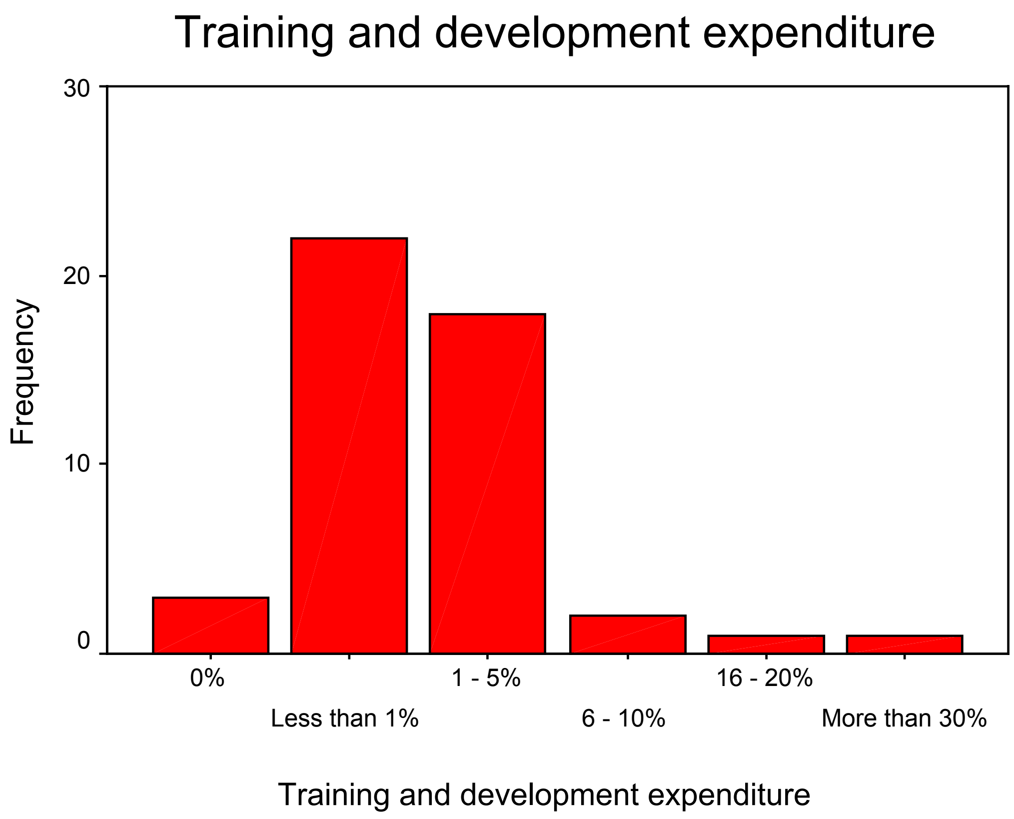
Product development/Research and Development	Frequency	Percent
0%	9	17.6
Less than 1%	16	31.4
1 - 5%	12	23.5
6 - 10%	6	11.8
11 - 15%	2	3.9
16 - 20%	1	2.0
Total	46	90.2
Missing	5	9.8
Total	51	100.0



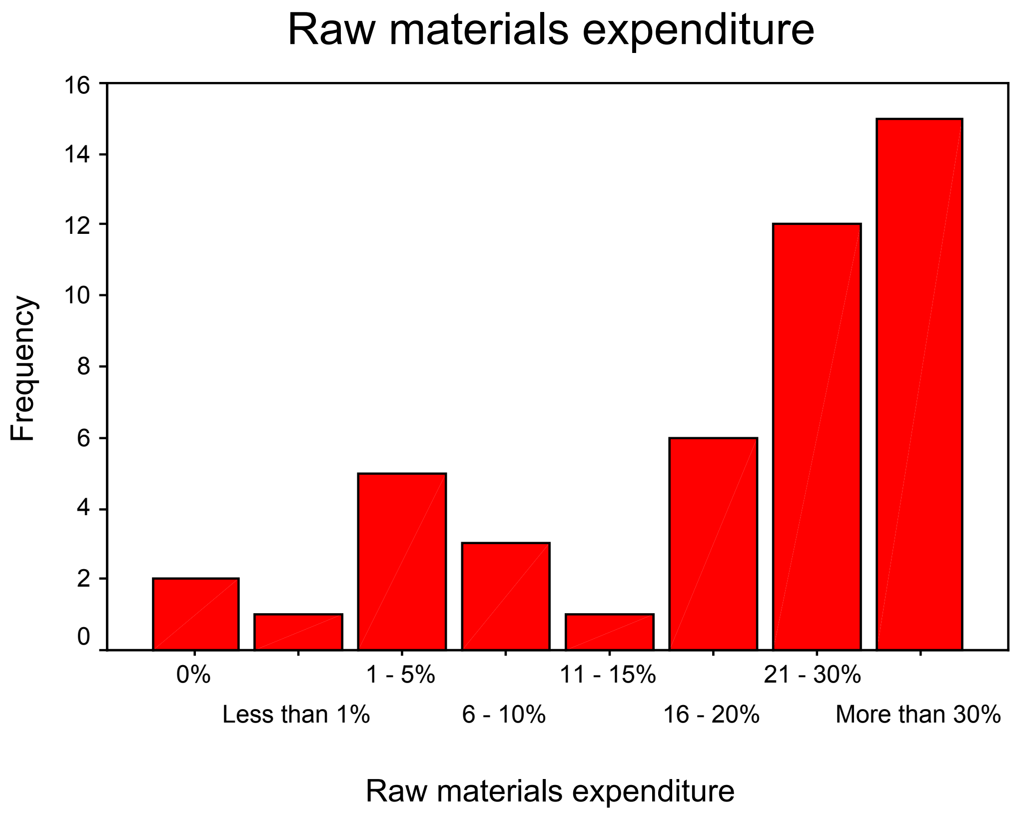
Marketing	Frequency	Percent
Less than 1%	13	25.5
1 - 5%	23	45.1
6 - 10%	5	9.8
11 - 15%	2	3.9
16 - 20%	2	3.9
Total	45	88.2
Missing	6	11.8
Total	51	100.0



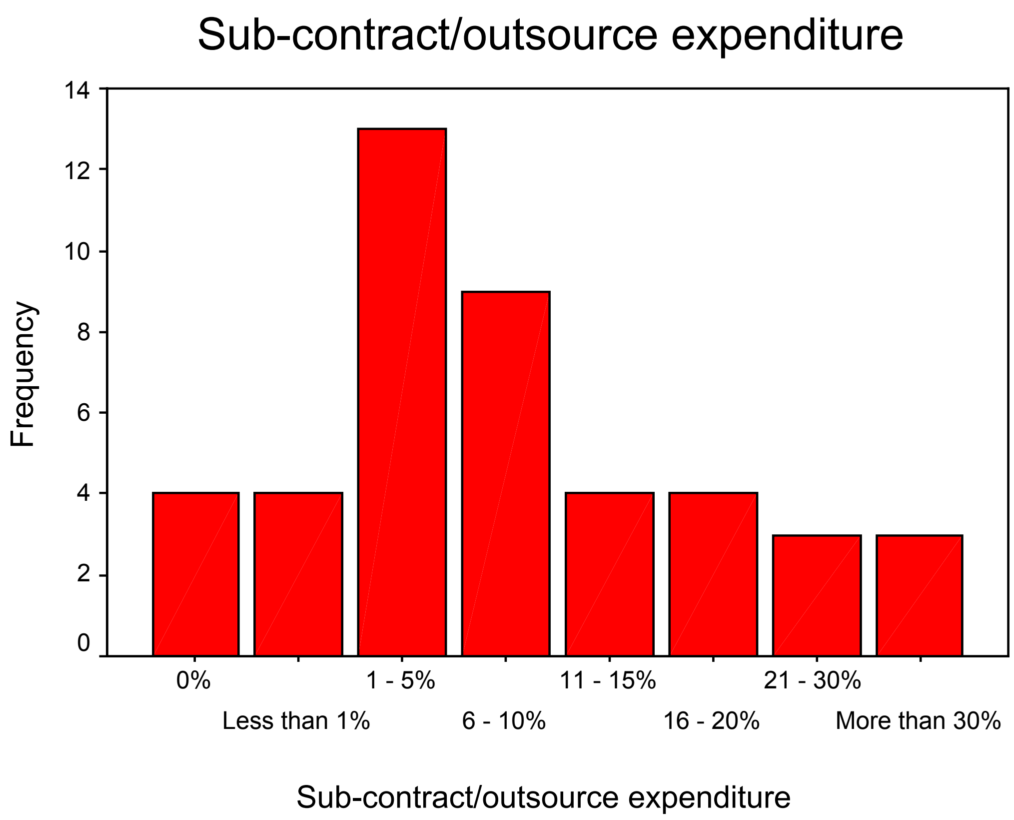
Training and development	Frequency	Percent
0%	3	5.9
Less than 1%	22	43.1
1 - 5%	18	35.3
6 - 10%	2	3.9
16 - 20%	1	2.0
More than 30%	1	2.0
Total	47	92.2
Missing	4	7.8
Total	51	100.0



Raw materials	Frequency	Percent
0%	2	3.9
Less than 1%	1	2.0
1 - 5%	5	9.8
6 - 10%	3	5.9
11 - 15%	1	2.0
16 - 20%	6	11.8
21 - 30%	12	23.5
More than 30%	15	29.4
Total	45	88.2
Missing	6	11.8
Total	51	100.0



Paying subcontractors/outsource suppliers	Frequency	Percent
0%	4	7.8
Less than 1%	4	7.8
1 - 5%	13	25.5
6 - 10%	9	17.6
11 - 15%	4	7.8
16 - 20%	4	7.8
21 - 30%	3	5.9
More than 30%	3	5.9
Total	44	86.3
Missing	7	13.7
Total	51	100.0

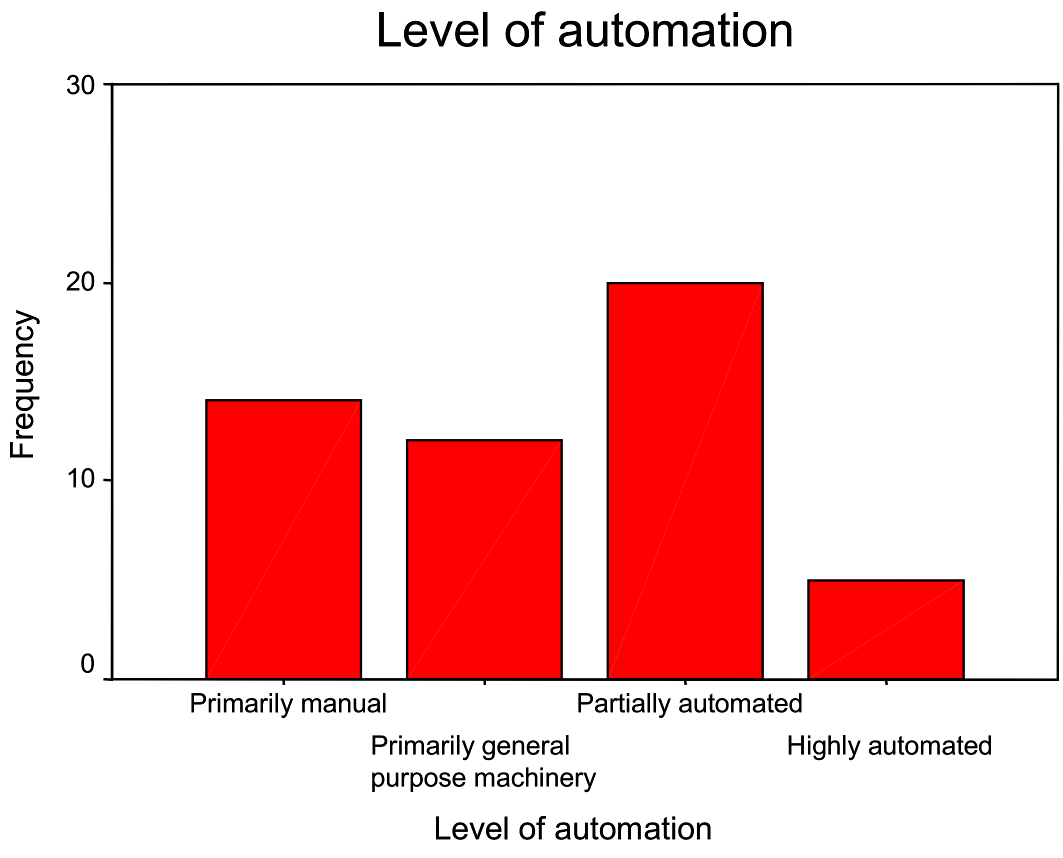


Average salary = £17,800

Technology

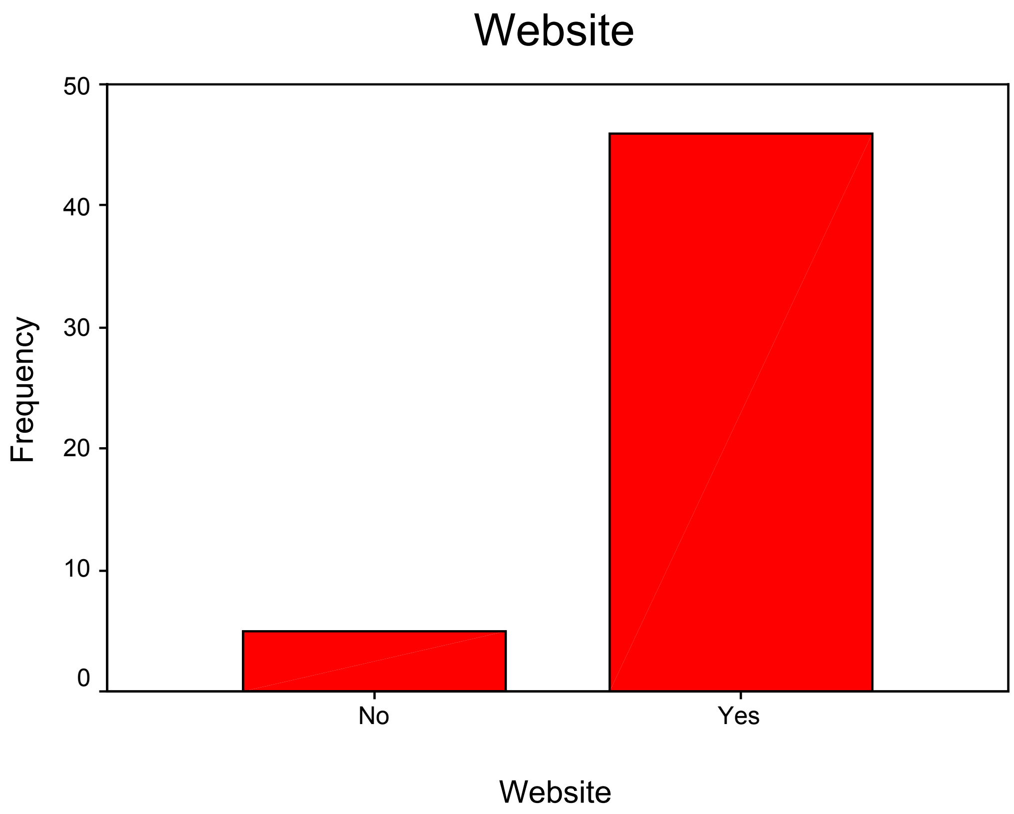
How would you describe the level of automation in your business?

	Frequency	Percent
Primarily manual	14	27.5
Primarily general purpose	12	23.5
Partially automated	20	39.2
Highly automated	5	9.8
Total	51	100.0



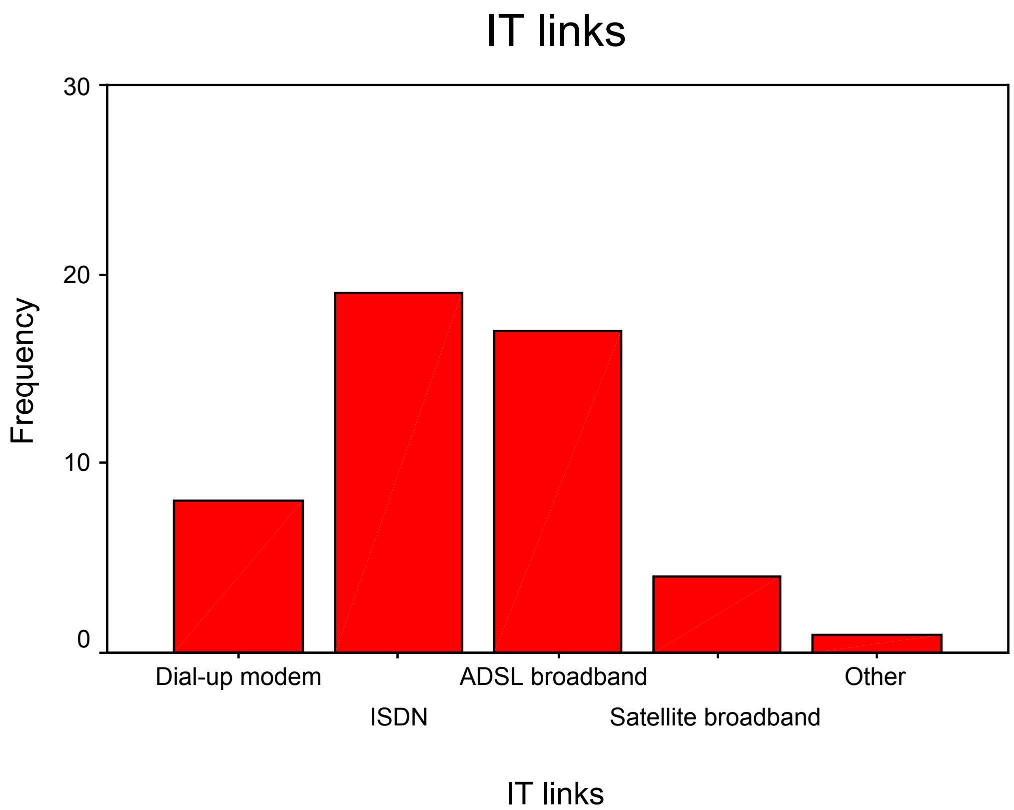
Does the company have a website?

	Frequency	Percent
No	5	9.8
Yes	46	90.2
Total	51	100.0



Which of the following IT links does your business-site use? (Only one type – most ‘sophisticated’ - shown per company.)

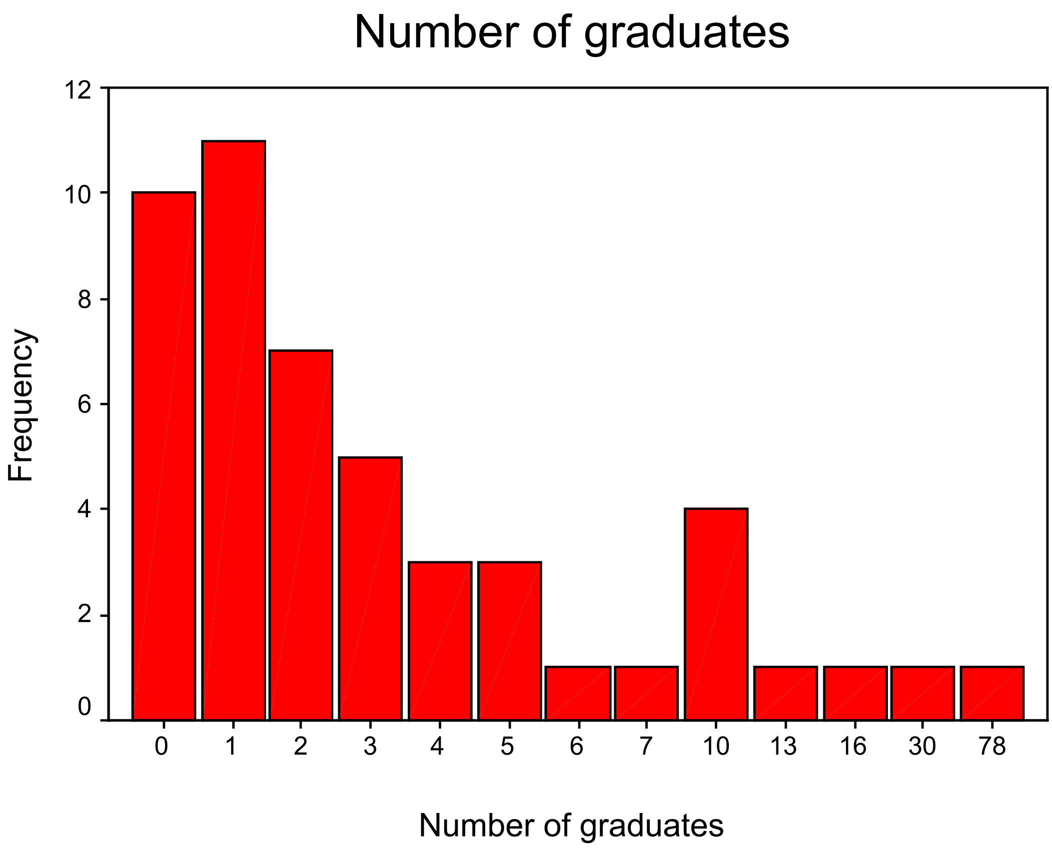
	Frequency	Percent
Dial-up modem	8	15.7
ISDN	19	37.3
ADSL broadband	17	33.3
Satellite broadband	4	7.8
Other	1	2.0
Total	49	96.1
Missing	2	3.9
Total	51	100.0



Employee skills and recruitment

How many graduates, if any, do you employ?

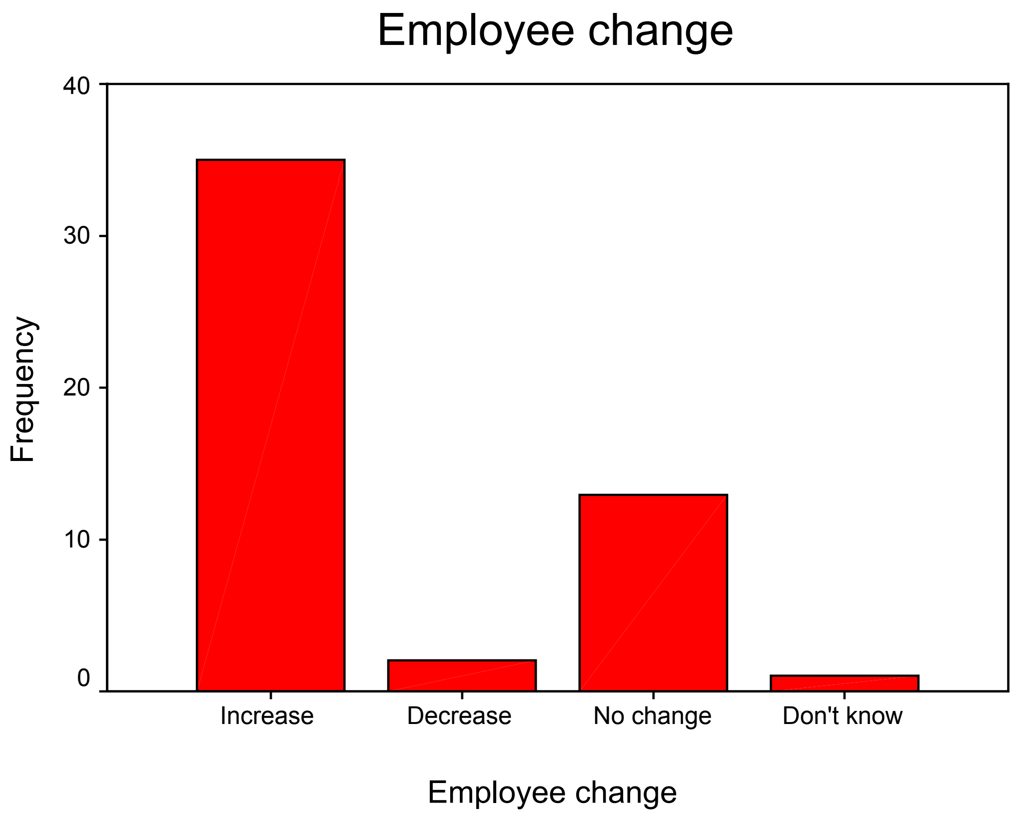
Number of graduate employees	Frequency	Percent
0	10	19.6
1	11	21.6
2	7	13.7
3	5	9.8
4	3	5.9
5	3	5.9
6	1	2.0
7	1	2.0
10	4	7.8
13	1	2.0
16	1	2.0
30	1	2.0
78	1	2.0
Total	49	96.1
Missing	2	3.9
Total	51	100.0



Total number of graduates = 257

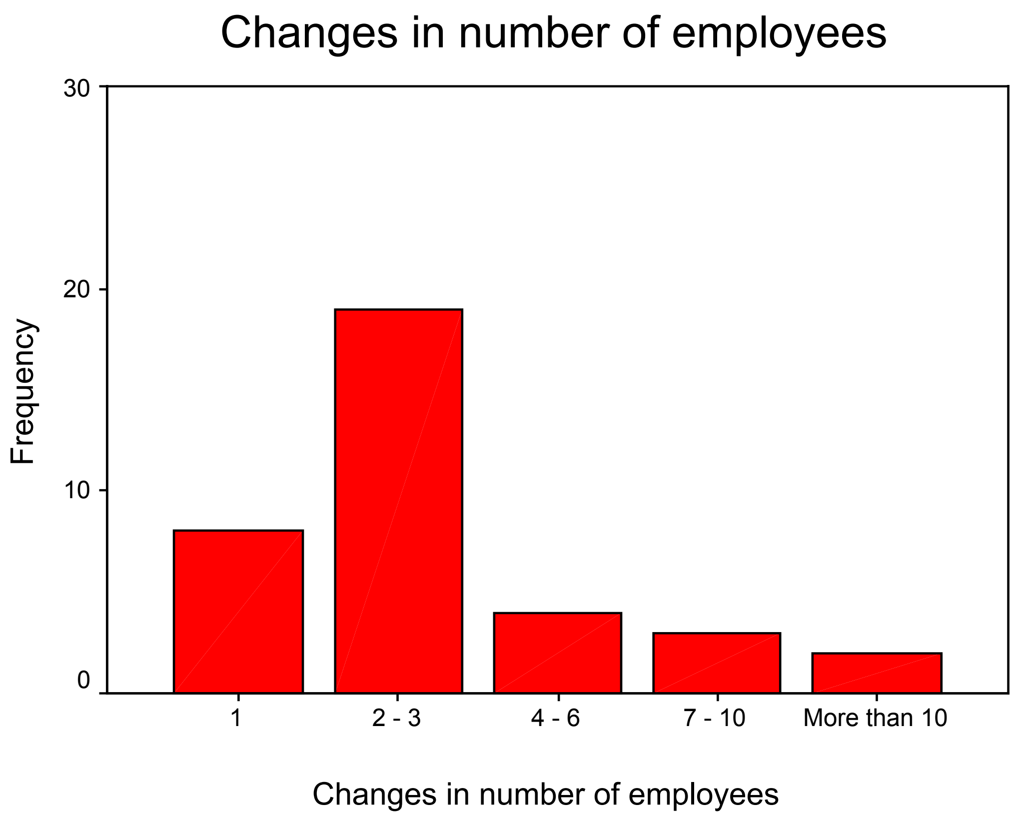
Do you anticipate an increase or decrease in the number of staff you employ over the next year?

	Frequency	Percent
Increase	35	68.6
Decrease	2	3.9
No change	13	25.5
Don't know	1	2.0
Total	51	100.0



Ranges of change in employees

	Frequency	Percent
1	8	15.7
2 - 3[1]	19	37.3
4 - 6	4	7.8
7 - 10	3	5.9
More than 10	2	3.9
Total	36	70.6
Missing	15	29.4
Total	51	100.0

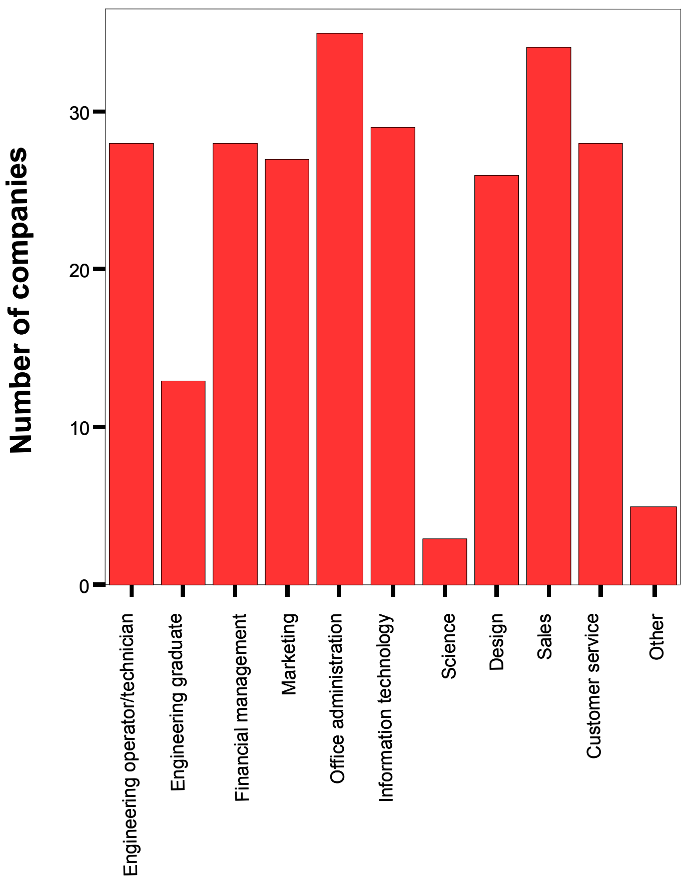


[1] One of the changes in the 2 – 3 range is a decrease in employees. All other numbers relate to increases in number of employees

What are the primary skills required by people in your organization?

Primary skills required	Number of companies
Engineering operator/technician	28
Engineering graduate	13
Financial management	28
Marketing	27
Office administration	35
Information technology	29
Science	3
Design	26
Sales	34
Customer service	28
Other	5

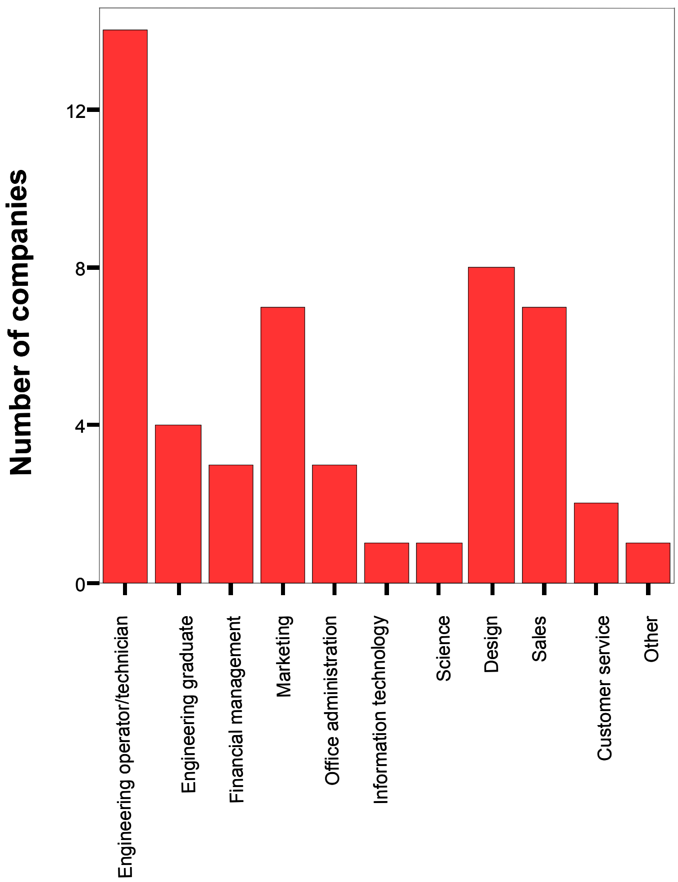
Required Skills



Do you suffer from skills shortage in any of the areas above?

Skills Shortage	**Number of companies**
Engineering operator/technician	14
Engineering graduate	4
Financial management	3
Marketing	7
Office administration	3
Information technology	1
Science	1
Design	8
Sales	7
Customer service	2
Other	1

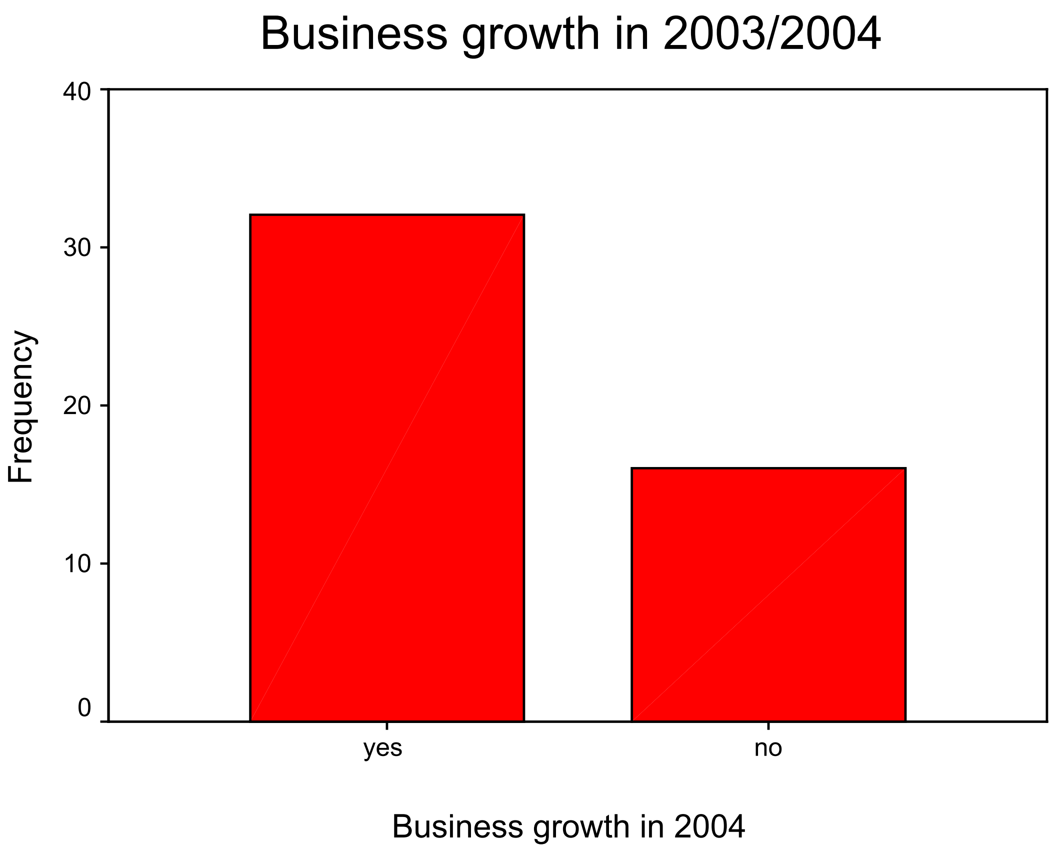
Skill shortage areas



Business Growth

Have the sales of your business grown in 2003/2004?

	Frequency	Percent
Yes	32	62.7
No	16	31.4
Total	48	94.1
Missing	3	5.9
Total	51	100.0

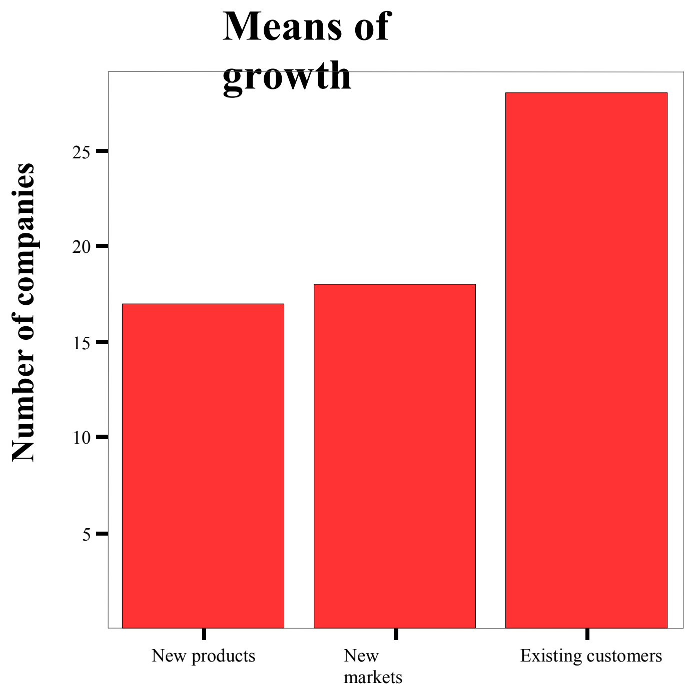


If the business grew, by what percentage sales did it grow?

	N	Minimum	Maximum	Mean	Std. Deviation
Percentage sales growth	28	1	25	12.64	7.688

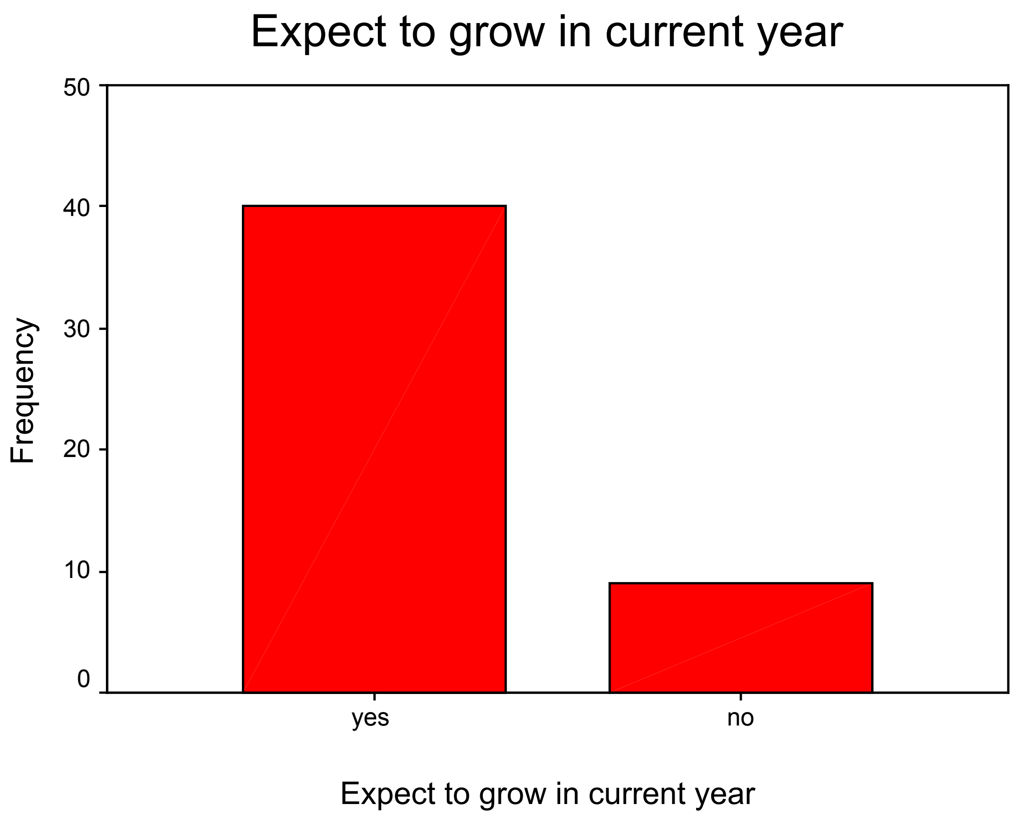
If yes, how has this growth occurred?

Means of growth	Number of companies
New products	17
New markets	18
Existing customers	28



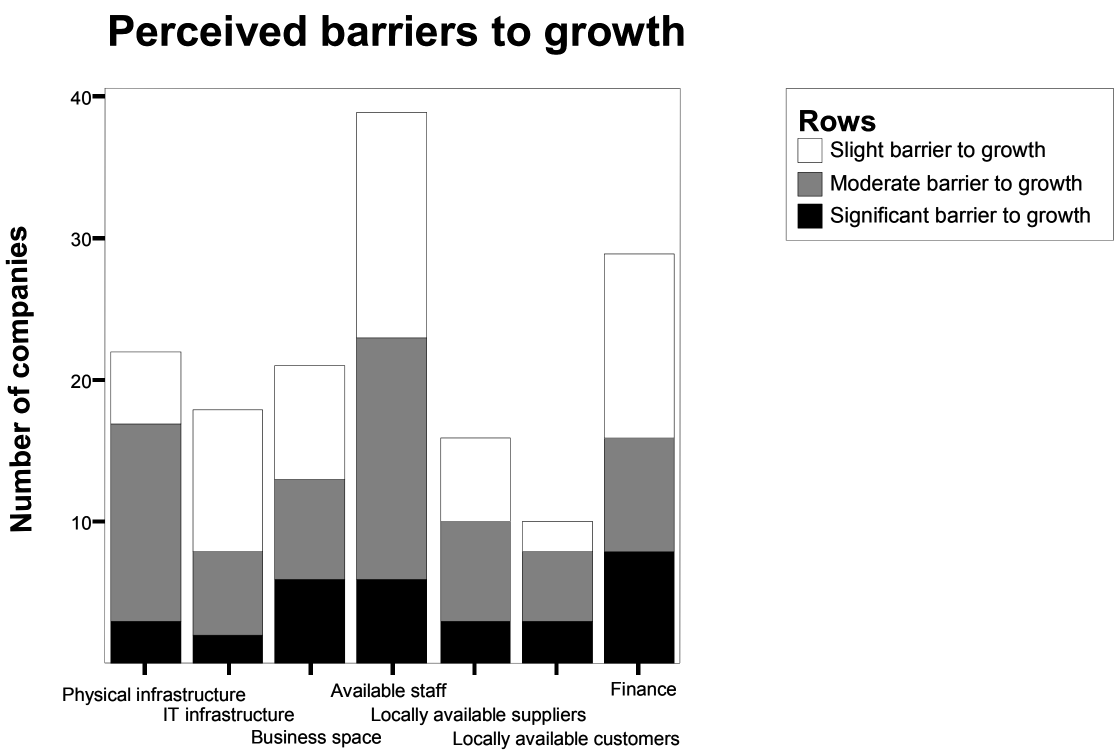
Do you expect to grow in the current financial year?

	Frequency	Percent
Yes	40	78.4
No	9	17.6
Total	49	96.1
Missing	2	3.9
Total	51	100.0



To what extent do you consider the following to be barriers to the growth of your business?

	Significant barrier to growth	Moderate barrier to growth	Slight barrier to growth	Not a barrier to growth
Physical infrastructure	3	14	5	16
IT infrastructure	2	6	10	22
Business space	6	7	8	20
Available staff	6	17	16	6
Locally available suppliers	3	7	6	24
Locally available customers	3	5	2	28
Finance	8	8	13	17



Operations issues

When dealing with suppliers, do you believe your location disadvantages your business compared to similar businesses in cities or large towns?

Disadvantage when dealing with suppliers	Frequency	Percent
Yes	20	39.2
No	31	60.8
Total	51	100.0

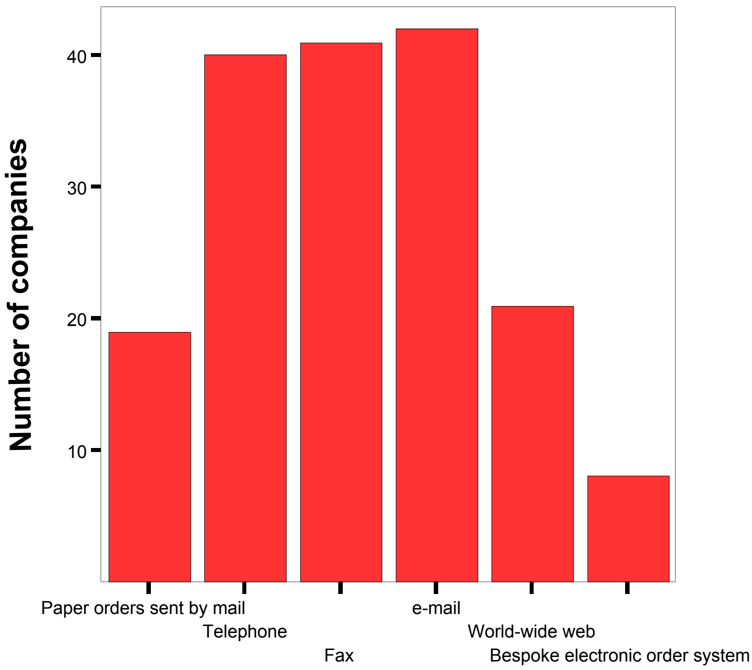
When dealing with customers, do you believe your location disadvantages your business compared to similar businesses in cities or large towns?

Disadvantage when dealing with customers	Frequency	Percent
Yes	16	31.4
No	34	66.7
Total	50	98.0
Missing	1	2.0
Total	51	100.0

How do you place orders with your suppliers?

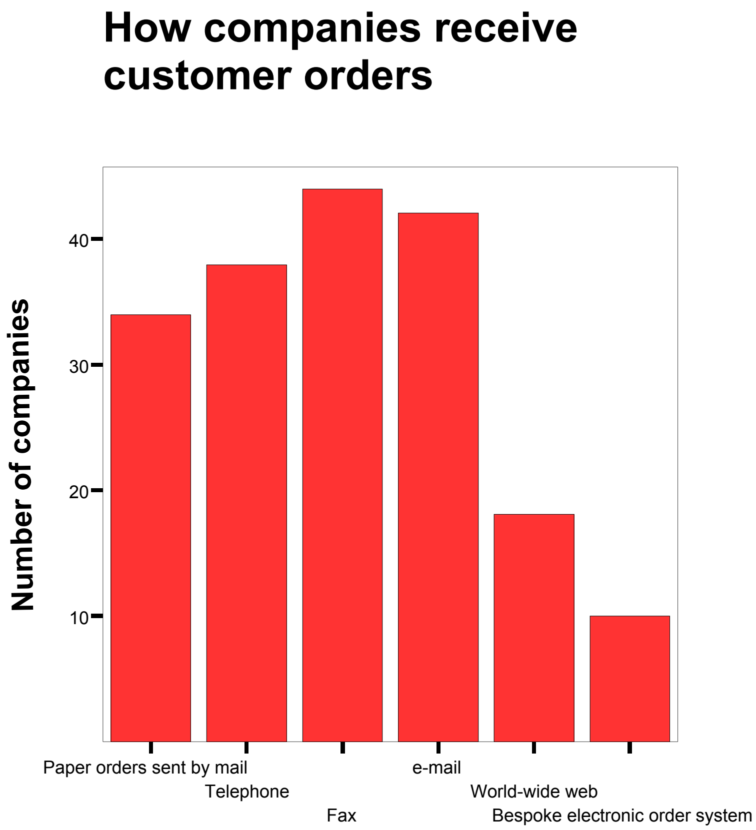
Means of placing orders	Number of companies
Paper orders sent by mail	19
By telephone	40
By fax	41
By e-mail	42
Using the world-wide web	21
By bespoke electronic order system	8

How companies place orders with suppliers



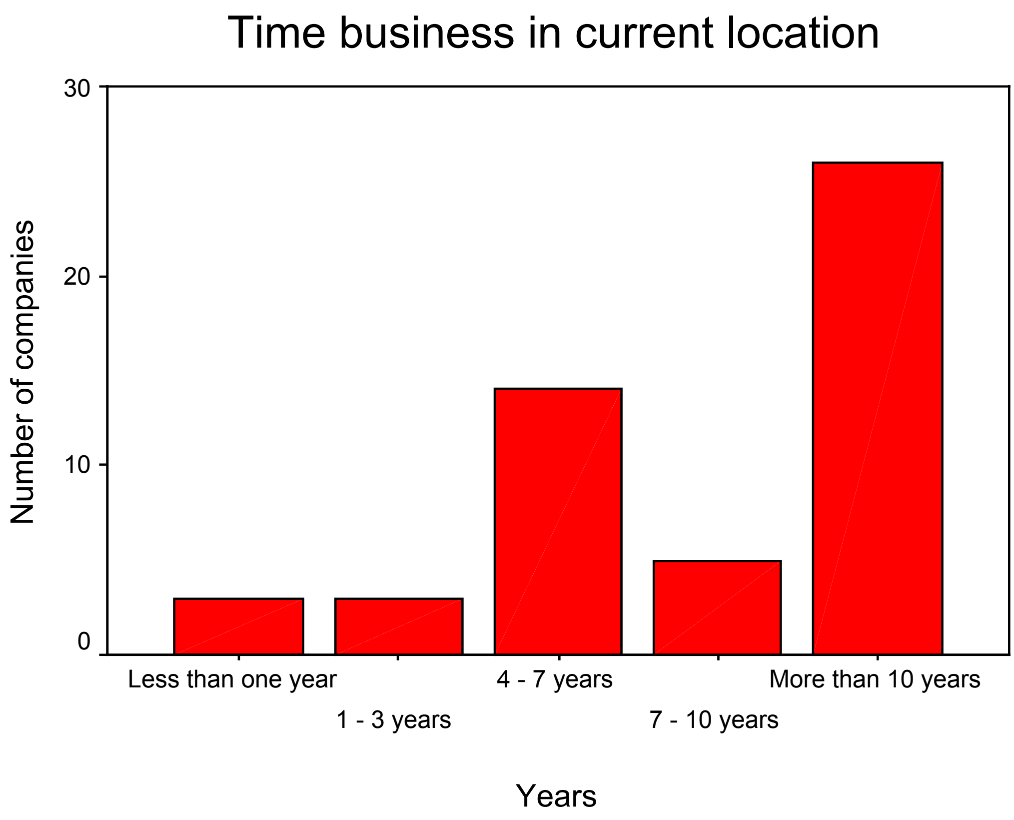
How do customers place orders with your business?

Means of receiving orders	Number of companies
Paper orders received by mail	34
By telephone	38
By fax	44
By e-mail	42
Using the world-wide web	18
By bespoke electronic order system	10



How long has your business been in its current location?

Time in current location	Frequency	Percent
Less than one year	3	5.9
1 - 3 years	3	5.9
4 - 7 years	14	27.5
7 - 10 years	5	9.8
More than 10 years	26	51.0
Total	51	100.0



Location of company over time

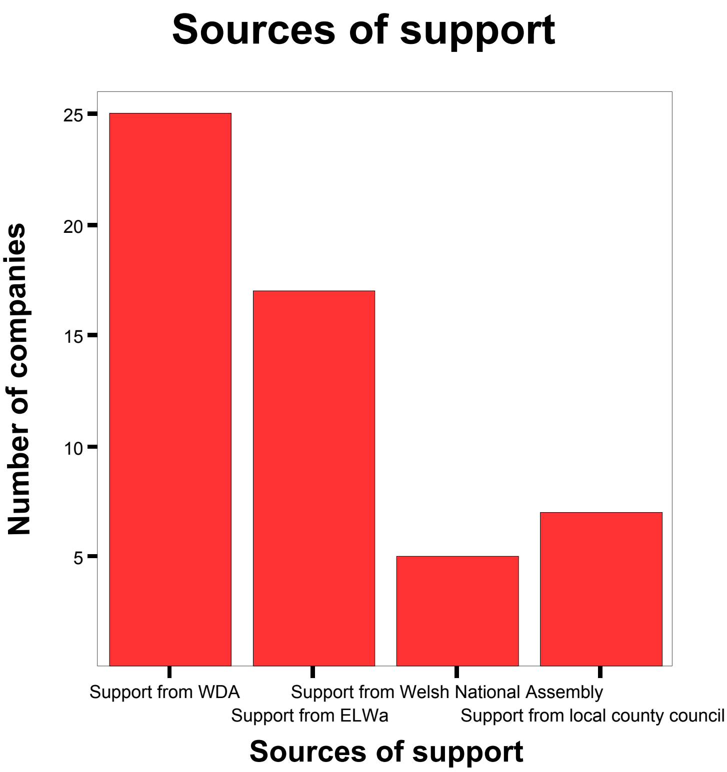
Company Location	**Frequency**	**Percent**
Always in its current location	19	37.3
Always in Mid-Wales	13	25.5
Moved to Mid-Wales from elsewhere in Wales	1	2.0
Moved to Mid-Wales from elsewhere in the UK	14	27.5
Sub-division of a multi-national	4	7.8
Total	51	100.0


Company location over time
Number of companies
30
20
10
0
Always current locat
Always in Mid-Wales
Moved from Wales
Moved from UK elsewh
Multinat sub-div
Company location

Support from other organizations

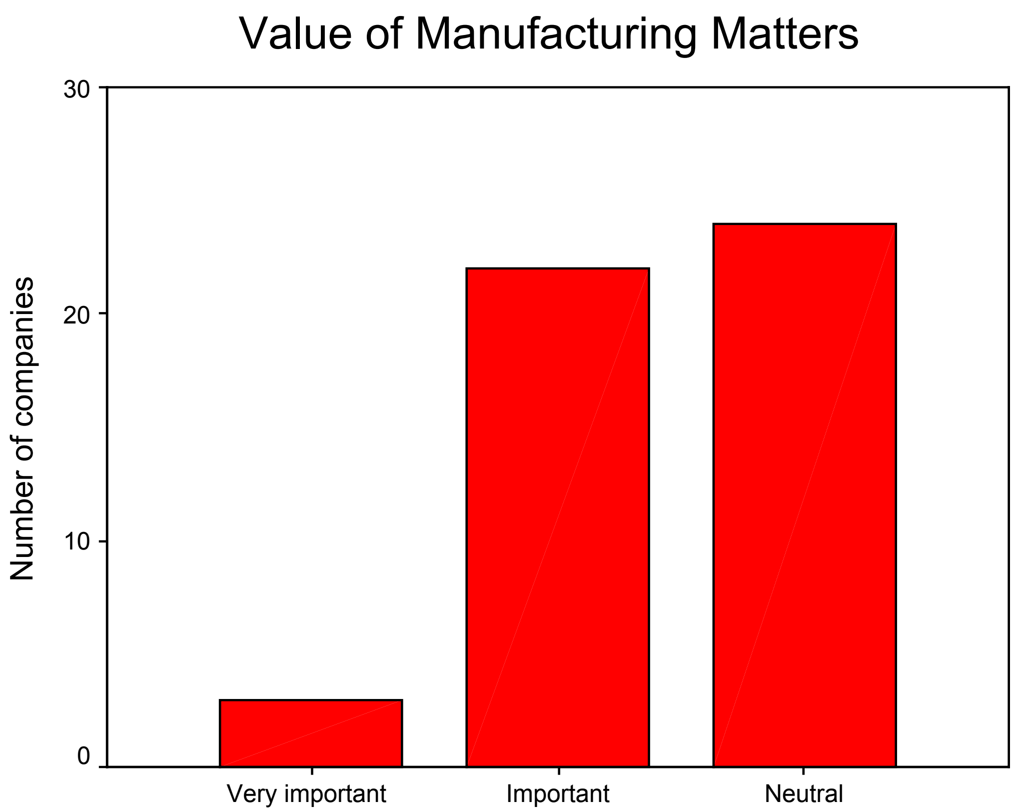
Have you received grant support from any of the following organizations in the last 12 months?

Support organization	Number of companies
WDA	25
ELWa	17
Welsh National Assembly	5
Local county council	7

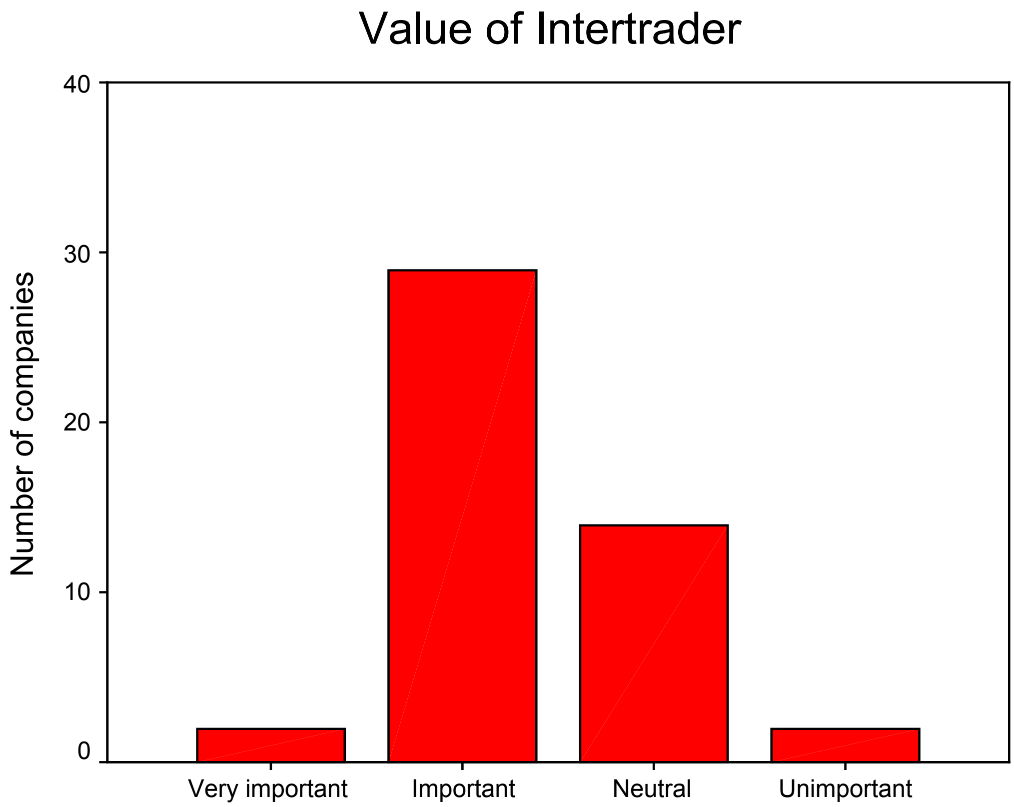


How companies value support from MWMG

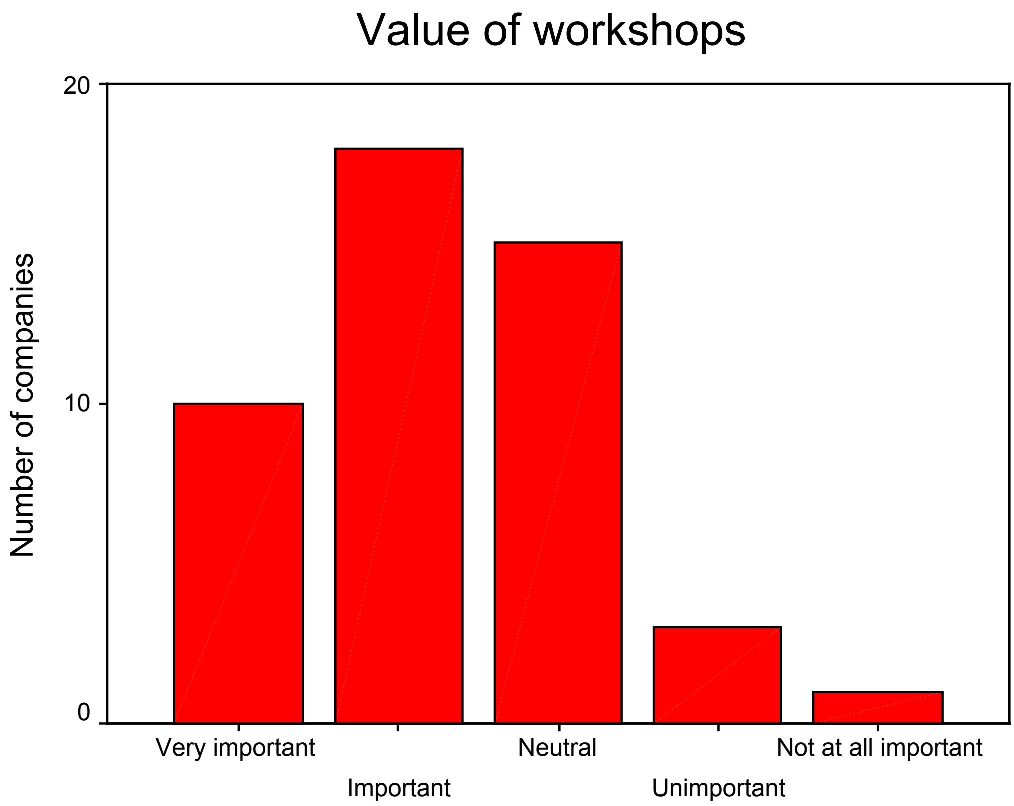
Manufacturing Matters Newsletter	**Frequency**	**Percent**
Very important	3	5.9
Important	22	43.1
Neutral	24	47.1
Total	49	96.1
Missing	2	3.9
Total	51	100.0


Value of Manufacturing Matters
Number of companies
30
20
10
0
Very important
Important
Neutral

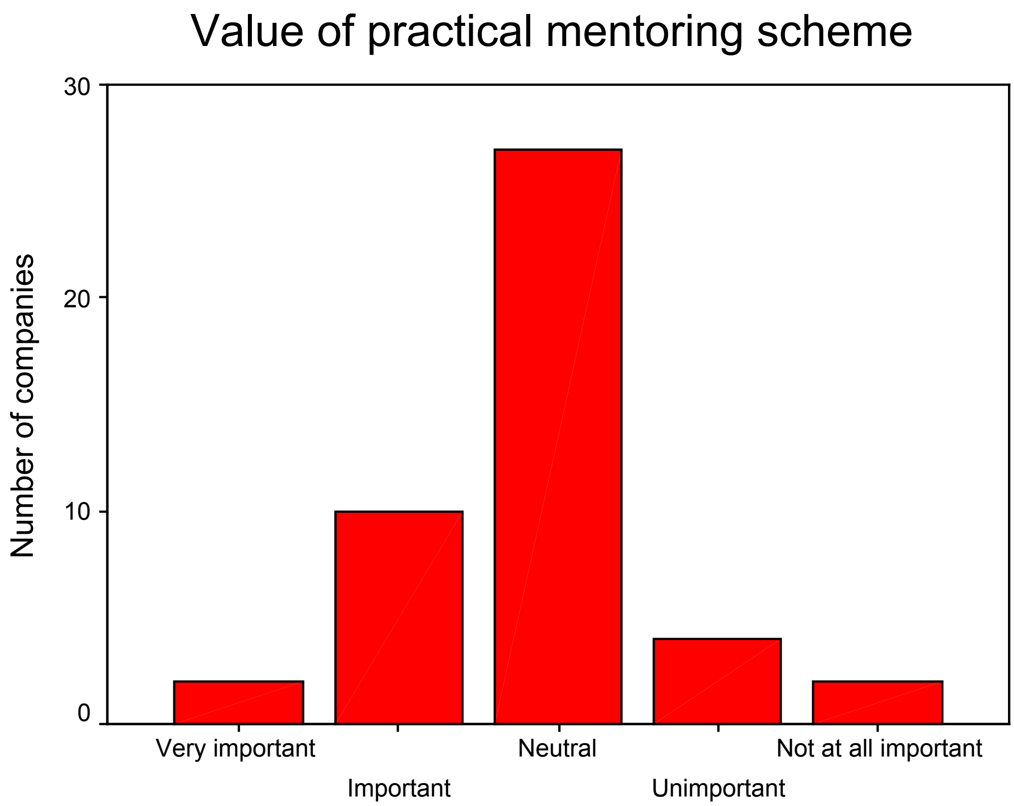
Intertrader Publication	Frequency	Percent
Very important	2	3.9
Important	29	56.9
Neutral	14	27.5
Unimportant	2	3.9
Total	47	92.2
Missing	4	7.8
Total	51	100.0



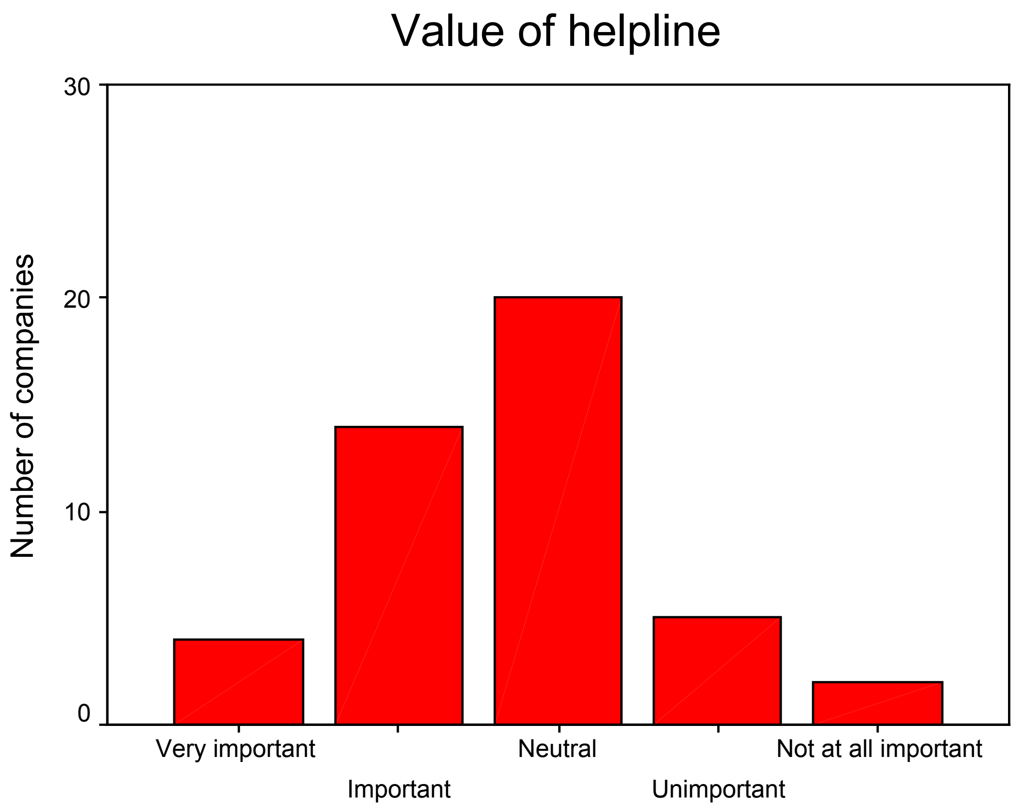
Workshops	Frequency	Percent
Very important	10	19.6
Important	18	35.3
Neutral	15	29.4
Unimportant	3	5.9
Not at all important	1	2.0
Total	47	92.2
Missing	4	7.8
Total	51	100.0



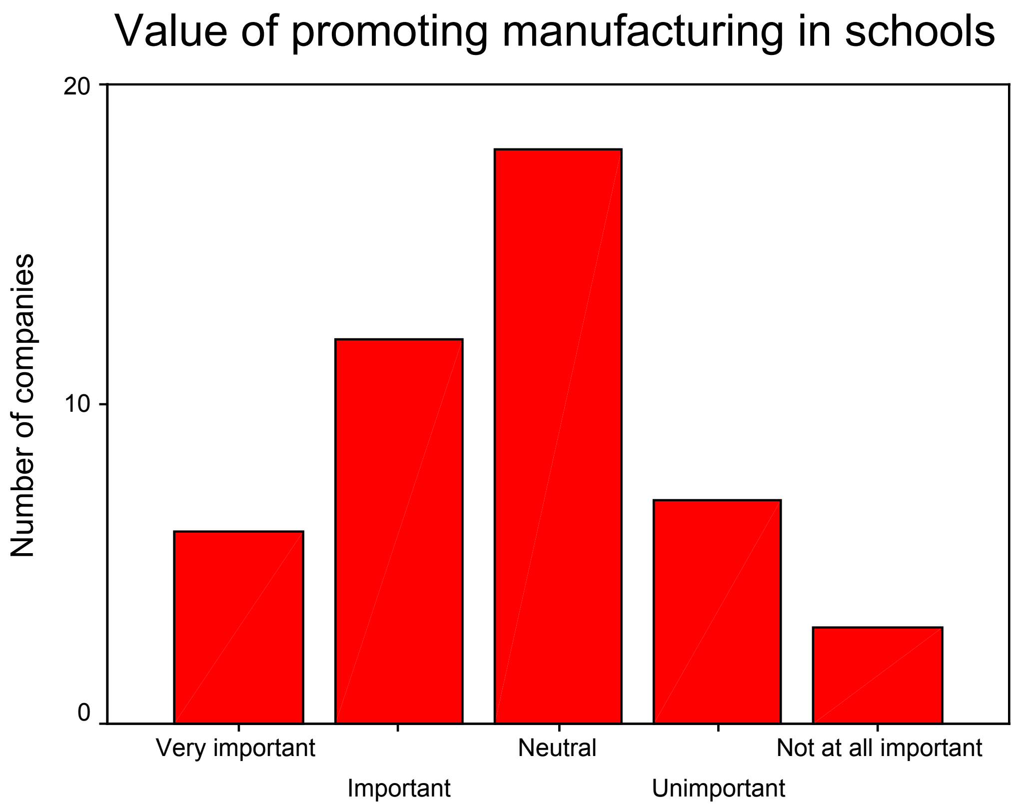
Practical Mentoring Scheme	**Frequency**	**Percent**
Very important	2	3.9
Important	10	19.6
Neutral	27	52.9
Unimportant	4	7.8
Not at all important	2	3.9
Total	45	88.2
Missing	6	11.8
Total	51	100.0



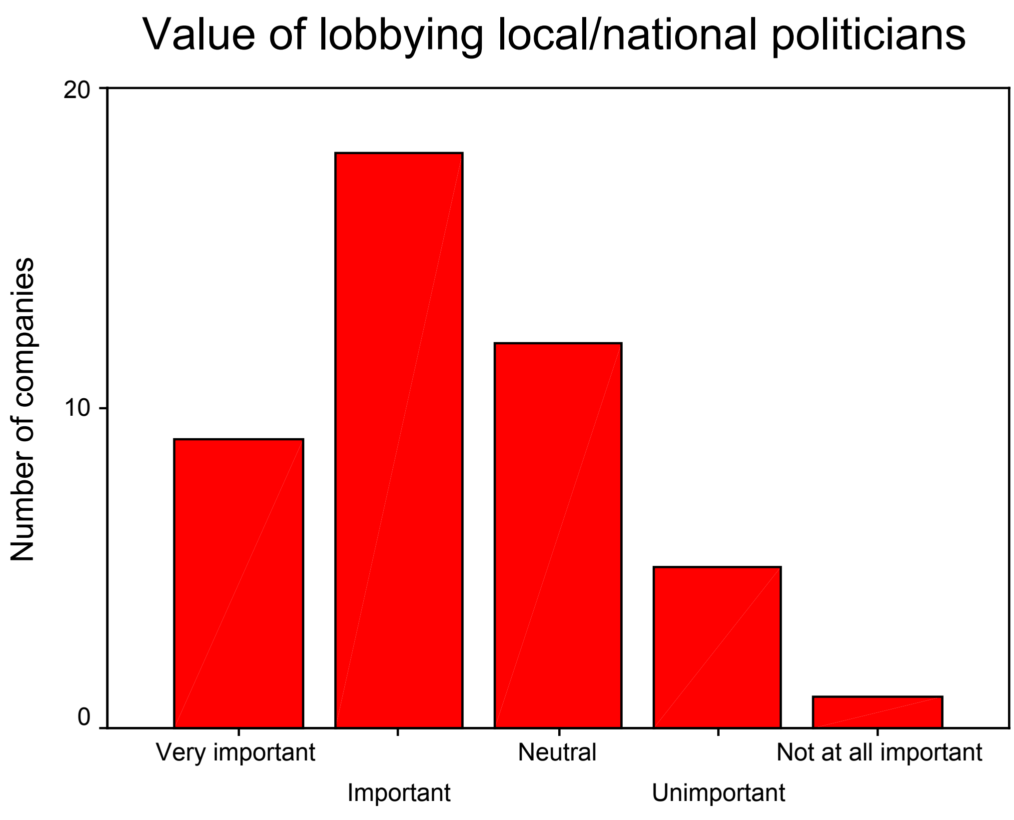
Help Line	**Frequency**	**Percent**
Very important	4	7.8
Important	14	27.5
Neutral	20	39.2
Unimportant	5	9.8
Not at all important	2	3.9
Total	45	88.2
Missing	6	11.8
Total	51	100.0



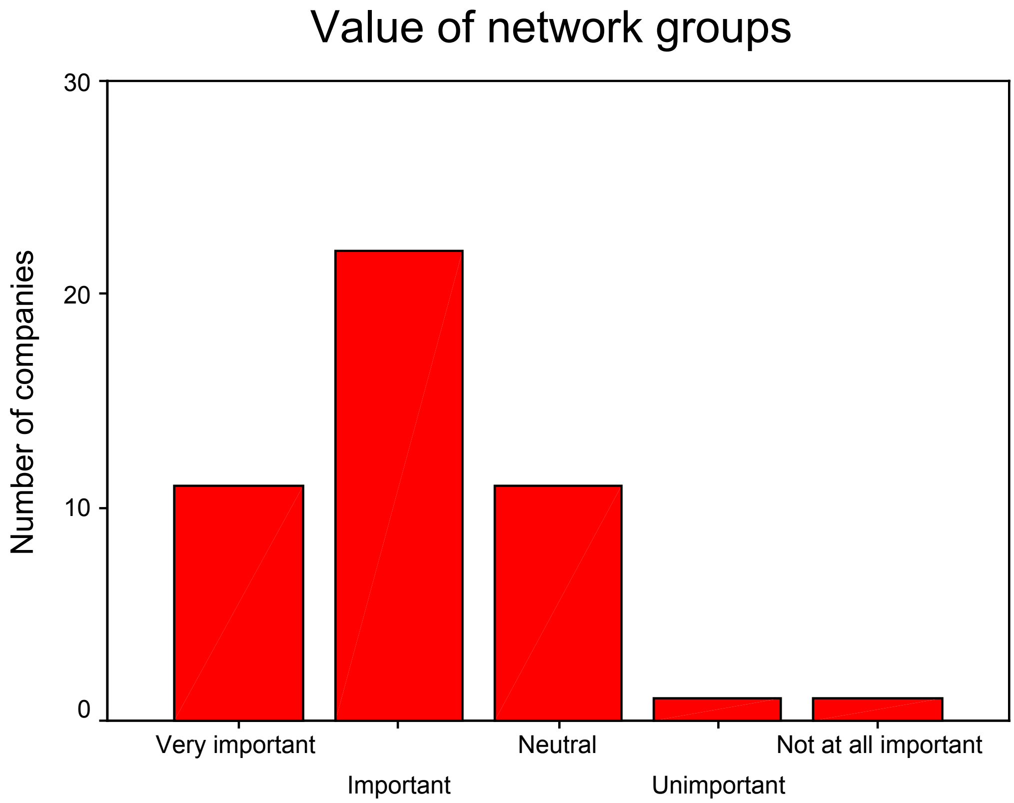
Promoting Manufacturing in Schools	Frequency	Percent
Very important	6	11.8
Important	12	23.5
Neutral	18	35.3
Unimportant	7	13.7
Not at all important	3	5.9
Total	46	90.2
Missing	5	9.8
Total	51	100.0



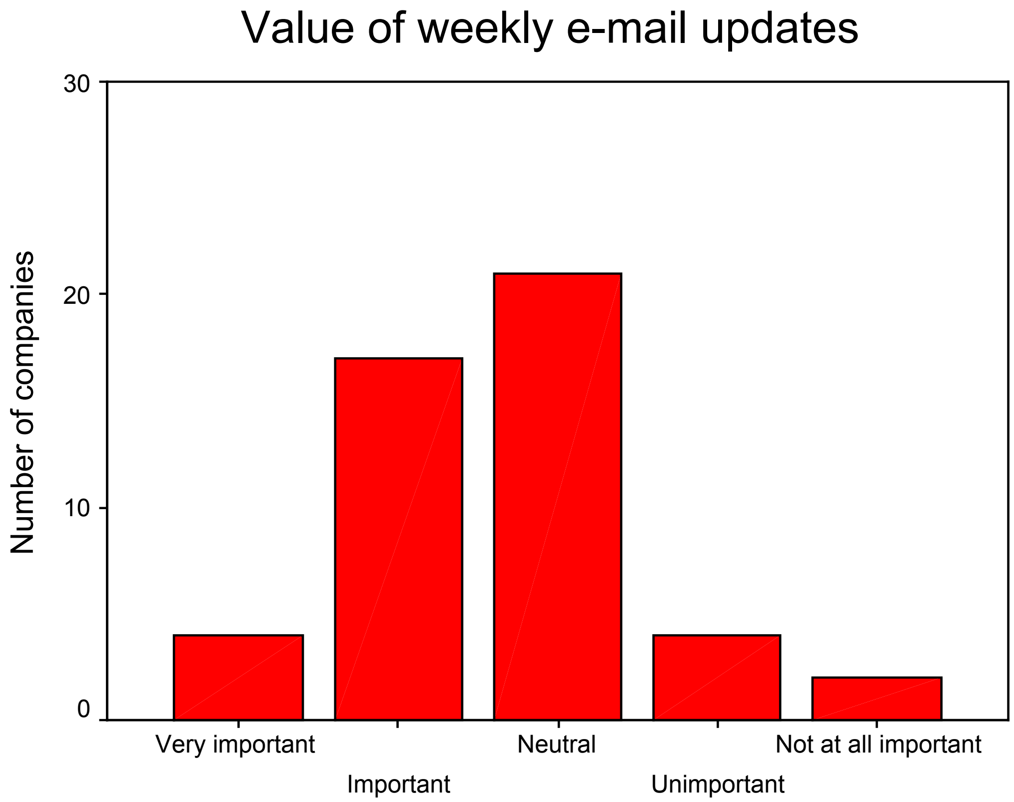
Lobbying local/national politicians	**Frequency**	**Percent**
Very important	9	17.6
Important	18	35.3
Neutral	12	23.5
Unimportant	5	9.8
Not at all important	1	2.0
Total	45	88.2
Missing	6	11.8
Total	51	100.0



Network Groups	Frequency	Percent
Very important	11	21.6
Important	22	43.1
Neutral	11	21.6
Unimportant	1	2.0
Not at all important	1	2.0
Total	46	90.2
Missing	5	9.8
Total	51	100.0



Value of weekly e-mail updates	Frequency	Percent
Very important	4	7.8
Important	17	33.3
Neutral	21	41.2
Unimportant	4	7.8
Not at all important	2	3.9
Total	48	94.1
Missing	3	5.9
Total	51	100.0



Are you aware of the MWMG Members' Directory on the website?

Aware of Members' Directory	**Frequency**	**Percent**
Yes	39	76.5
No	11	21.6
Total	50	98.0
Missing	1	2.0
Total	51	100.0

For those who are aware of the directory, have you used it?

Used members' directory?	Yes	22
	No	17

List of Member Companies 2004 / 2005

Aber Instruments Ltd	Aberystwyth
Actia UK Ltd	Newtown
Alpha Fasteners	Brecon
Anderson Apparel Ltd	Llanbrynmair
Anita Marquetry	Llandrindod Wells
Aragon Services Ltd	Aberystwyth
Avery Dennison	Newtown
B K Signs	Aberystwyth
Beacon Foods	Brecon
Beacons Business Interiors Ltd	Brecon
BHC (Honey Suppliers) Ltd	Builth Wells
Boynes Ltd	Newtown
Brecon Pharmaceuticals	Hay on Wye
Broadcrown Exports Ltd	Newtown
BSW Sawmills Ltd	Builth Wells
Byteback Systems Ltd	Machynlleth
Calserv	Frongoch
Cambrian Foundry Ltd	Newtown
Cambrian News Ltd	Aberystwyth
Cambrian Printers Ltd	Aberystwyth
Carling Point	Newtown
Carpenter & Paterson	Welshpool
Cellpath PLC	Newtown
Centre for Alternative Technology	Machynlleth
Cerion Ltd	Glasbury on Wye
Charcroft Electronics Ltd	Llanwrtyd Wells
Chrysalis Designs	Llandinam
Chunkies	Aberaeron
Compact Orbital Gears	Rhayader
Confederate Chemicals	Newtown
Constructiv Company	Newtown
Contact Attachments	Newtown
Contour Computers Ltd	Cemmaes
Control Techniques Drives Ltd	Newtown
D Sidoli & Sons	Welshpool
Dairi-Pak	Ruyton XI Towns
Dairygold Food Products (UK) Ltd	Felinfach
Dancewear UK	Brecon
Darrian Cars	Lampeter
Davlec Ltd	Welshpool
Delta Systems	Carmarthen
Dragonfly	Glan y Nant
Dulas Ltd	Machynlleth
Dyfed Steels (Mid Wales) Ltd	Newtown
Dyke Engineering	Newtown
E O M Ltd	Newtown

Elkay Electrical	Newtown
Elliott Group Ltd	Newtown
Essanti Textiles	Llandrindod Wells
Faber Technology	Newtown
Ffab Productions Ltd	Aberystwyth
FisherCast Global Corporation	Welshpool
Floform	Welshpool
Fulmac UK Ltd	Newtown
gmg aqua ltd	Talgarth
Greenaway UK & Co Ltd	Bryncrug
GSM Primographic	Brecon
Halo Foods Ltd	Tywyn
High Lea (Presteigne) Ltd	Presteigne
Highpath Engineering	Cribyn
Hippo Campo	Crickhowell
Huggababy	Trallong
Imprint	Newtown
Invertek Drives Ltd	Four Crosses
James Davies (abercych) Ltd	Cenarth
JL French Presteigne	Presteigne
Kenton Jones Woods of Wales	Welshpool
Kitech Ltd	Welshpool
Labtech Ltd	Presteigne
Laminating Technology	Penybont Road
Laura Ashley/Texplan Manufacturing	Newtown
Lazertran	Aberaeron
Linton Services	Presteigne
Livesey Ltd	Shrewsbury
Lyn Marsden Soft Furnishing Service Ltd	Tregaron
M & S Services	Newtown
Makefast Ltd	Newtown
Mangar International	Presteigne
MDF Profiles	Welshpool
Menai Foam & Board	Parys Road
Merionethshire Granite Company	Trawsfynyff
Michael Ellis Furniture	Newtown
Mid Wales Stone	Dolanog
Mid Wales.Com	Abermule
Mil-tek Express Ltd	Castle Morris
Music & Media Distribution	Henfaes Lane
Nerak-Weise Ltd	Brecon
Newmor Group Ltd	Welshpool
NiBS Ltd	Welshpool
Oriel Jones & Sons	Llanbydder
Pamargan Products Ltd	Newtown
Paradox IT Ltd	Llanidloes
Performance Clothing	Llandrindod Wells

Pixel Foundry	Ceinws
Polyco Ltd	Newtown
Powergen UK Ltd	Aberystwyth
Precision Engineer	Welshpool
Protherics UK Ltd	Llandysul
Protocol Control Systems Ltd	Knighton
Pugh Computers Ltd	Llanon
Pulsar Systems	Penrhyncoch
Quality Tool and Engineering	Llanidloes
Rachel's Organic	Aberystwyth
Radnor Hills Mineral Water	Knighton
RCH International Ltd	Dolgellau
Rednal Industries Ltd	Oswestry
RFM Services	Caersws
Rimington Solutions	Presteigne
Scanwel Ltd	Bala
Severn Media Group	Newtown
Severn Timber Products Ltd	Welshpool
Silver Scenes Ltd	Welshpool
Skye Instruments	Llanidrindod Wells
Sound Induction Systems	Newtown
Spencer Davies Engineering	Burry Port
SPX Contech	Welshpool
Stadco Powys	Llanfyllin
Stagecraft Display Ltd	Llaithddu
Streetmaster Products	Ystradgynlais
T S Henderson	Hay on Wye
Technocover Ltd	Welshpool
The Burger Manufacturing Company	Llanelwedd
The Gift of Wales	Silian
The Milford Collection	Newtown
Thermatex Ltd	Station Road
Traltec UK Ltd	Welshpool
Trax JH Ltd	Welshpool
Triggs Wood Forms	Gwern y Brenin
Ty Mawr Lime Ltd	Llangasty
Ty Nant Spring Water	Llanon
Uniwire Ltd	Aberystwyth
Volac International Ltd	Felinfach
Welsh Mustard Company	Aberaeron
Welsh Oak Frame	Caersws
Welsh Pantry Ltd	Dolgellau
William O'Hanlon Ltd	Newtown
Winslow Adaptics	Brecon
Wipak UK Ltd	Welshpool
Woollies	Norton
WPG Ltd	Welshpool

Wrentech Design Ltd	Moylegrove
Wynnstay & Clwyd Farmers PLC	Llansantffraid
Zyron Trading Ltd	Llanbrynmair

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