

Confidential

# Industrial trends survey

## Number 225 July 2017

Office use only:

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Welcome to the CBI quarterly industrial trends survey. We would like to thank you for your valued support of the survey – providing us with a key insight into manufacturing conditions. The survey includes special questions on firms' price inflation and wage growth expectations. Data from these questions will be provided to The Bank of England on a strictly confidential and anonymised basis. Please answer on behalf of your UK manufacturing operations only. If you have any questions, please do not hesitate to contact us at [surveymanagementgroup@cbi.org.uk](mailto:surveymanagementgroup@cbi.org.uk)

Please submit your response using one of the following options:

- By email – contact [surveymanagementgroup@cbi.org.uk](mailto:surveymanagementgroup@cbi.org.uk) for an electronic questionnaire to complete
- By fax to 020 7836 1210 or 020 7836 5856
- Post your response (address at bottom of page).

Closing date: *Thursday 13 July 2017.*

Thankyou very much in advance for your response.

**Anna Leach – head of economic intelligence**

**1 Are you more, or less, optimistic than you were three months ago about the general business situation in your industry?**

More	Same	Less
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**2 Are you more, or less, optimistic about your export prospects for the next twelve months than you were three months ago?**

More	Same	Less	n/a
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**3 Do you expect to authorise more or less capital expenditure in the next twelve months than you authorised in the past twelve months on:**

	More	Same	Less	n/a
a) Buildings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) Plant and machinery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**4 Is your present level of output below capacity (ie are you working below a satisfactory full rate of operation)?**

Yes	No	n/a
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**4a What is your current rate of operation as a percentage of full capacity?**

*(please tick one box below. All participants should answer this question)*

<input type="checkbox"/> 1-5	<input type="checkbox"/> 6-10	<input type="checkbox"/> 11-15	<input type="checkbox"/> 16-20	<input type="checkbox"/> 21-25	<input type="checkbox"/> 26-30	<input type="checkbox"/> 31-35
<input type="checkbox"/> 36-40	<input type="checkbox"/> 41-45	<input type="checkbox"/> 46-50	<input type="checkbox"/> 51-55	<input type="checkbox"/> 56-60	<input type="checkbox"/> 61-65	<input type="checkbox"/> 66-70
<input type="checkbox"/> 71-75	<input type="checkbox"/> 76-80	<input type="checkbox"/> 81-85	<input type="checkbox"/> 86-90	<input type="checkbox"/> 91-95	<input type="checkbox"/> 96-100	<input type="checkbox"/> 100%+

*(ie overtime/extra shifts)*

**5 Excluding seasonal variations, do you consider that in volume terms:**

	Above normal	Normal	Below normal	n/a
a) Your present total order book is	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) Your present export order book is	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	More than adequate	Adequate	Less than adequate	n/a
c) Your present stocks of finished goods are	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please complete and return to the  
CBI survey management group by **Thursday 13 July 2017**

Survey management group CBI Cannon Place 78 Cannon Street London EC4N 6HN  
T: +44 (0)20 7395 8081/8104 F: +44 (0)20 7836 1210/5856 Email: [surveymanagementgroup@cbi.org.uk](mailto:surveymanagementgroup@cbi.org.uk)

Please turn over to complete the questionnaire

**6 Excluding seasonal variations, what has been the trend over the past three months and what are the expected trends for the next three months, with regard to:**

	Trend over past three months				Expected trend over next three months			
	Up	Same	Down	n/a	Up	Same	Down	n/a
Numbers employed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>7 Volume of total new orders of which:</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
a) domestic orders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) export orders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>8 Volume of output (ie production)</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>9 Volume of:</b>								
a) domestic deliveries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) export deliveries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>10 Volume of stocks of:</b>								
a) raw materials and brought-in supplies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) work in progress	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c) finished goods	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>11 Average costs per unit of output</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>12 Average selling prices at which:</b>								
a) domestic orders/sales are booked	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) export orders/sales are booked	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>13 Approximately how many months' production is accounted for by your present order book or production schedule?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<1	1-3	4-6	7-9	10-12	13-18	18+	n/a

**14 What factors are likely to limit your output over the next three months? (please leave completely blank if you have no limits to output)**

Orders or sales	Skilled labour	Other labour	Plant capacity	Credit or finance	Materials or components	Other
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**15 What factors are likely to limit your ability to obtain export orders over the next three months? (please leave completely blank if you have no limits to output)**

Prices (compared with overseas competitors)	Delivery dates	Credit or finance	Quota and import licence restrictions	Political or economic conditions abroad	Other
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**15a Excluding seasonal variations, what has been the trend in your competitiveness over the past three months, and what are the expected trends for the next three months, with regard to (please tick one box on each line):**

	Past three months				Next three months			
	Improved	Unchanged	Worsened	n/a	Improved	Unchanged	Worsened	n/a
UK market only	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other EU markets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Non-EU markets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**16a In relation to expected demand over the next twelve months, is your present fixed capacity:**

More than adequate	Adequate	Less than adequate
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**16b What are the main reasons for any expected capital expenditure authorisations on buildings, plant or machinery over the next twelve months? (if you tick more than one factor, please rank in order of importance)**

<input type="text"/>	To expand capacity	<input type="text"/>	To increase efficiency	<input type="text"/>	For replacement
<input type="text"/>	Other	<input type="text"/>	n/a		

**16c What factors are likely to limit (wholly or partly) your capital expenditure authorisations over the next twelve months? (if you tick more than one factor, please rank in order of importance)**

<input type="text"/>	Inadequate net return on proposed investment	<input type="text"/>	Uncertainty about demand
<input type="text"/>	Shortage of internal finance	<input type="text"/>	Shortage of labour, including managerial and technical staff
<input type="text"/>	Inability to raise external finance	<input type="text"/>	Other
<input type="text"/>	Cost of finance	<input type="text"/>	n/a

**17 Do you expect to authorise more or less expenditure in the next twelve months than you authorised over the past twelve months on:**

	<b>more</b>	<b>same</b>	<b>less</b>	<b>n/a</b>
a) Product and process innovation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) Training and retraining	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**18 What has been the percentage change over the past 12 months in the general level of output prices in the UK markets that your firm competes in and what is expected to occur over the next 12 months and the following 12 months? (please tick one box only on each line)**

	Negative percentage change					No change	Positive percentage change				
	-8.1% to -10%	-6.1% to -8%	-4.1% to -6%	-2.1% to -4%	-0.1% to -2%		0.1% to 2%	2.1% to 4%	4.1% to 6%	6.1% to 8%	8.1% to 10%
Past 12 months	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Next 12 months	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Following 12 months	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify % +/-)	Past 12 months <input type="text"/> %					Next 12 months <input type="text"/> %	Following 12 months <input type="text"/> %				

**19 What has been the percentage change over the past 12 months in your firm's own average output price for goods sold into UK markets and what is expected to occur over the next 12 months? (please tick one box only on each line)**

	Negative percentage change					No change	Positive percentage change				
	-8.1% to -10%	-6.1% to -8%	-4.1% to -6%	-2.1% to -4%	-0.1% to -2%		0.1% to 2%	2.1% to 4%	4.1% to 6%	6.1% to 8%	8.1% to 10%
Past 12 months	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Next 12 months	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify % +/-)	Past 12 months <input type="text"/> %					Next 12 months <input type="text"/> %					

**20 What has been the percentage change over the past 12 months in your firm's wage/salary cost per person employed (including overtime and bonuses) and what is expected to occur over the next 12 months? (please tick one box only on each line)**

	Negative percentage change			No change	Positive percentage change							
	-1.1% to -2%	-0.1% to -1%			0.1% to 1%	1.1% to 2%	2.1% to 3%	3.1% to 4%	4.1% to 5%	5.1% to 6%	6.1% to 7%	7.1% to 8%
Past 12 months	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Next 12 months	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify % +/-)	Past 12 months <input type="text"/> %			Next 12 months <input type="text"/> %								

## Basic data section

Please enter here the code number of the main manufacturing activity covered by this return. (If you are unsure of your correct Industrial Classification, please state clearly below your manufacturing activity being as specific as possible)

How many employees are covered by this return?

1-199       200-499       500-4,999       5,000 and over

What is the annual ex-works value of your direct exports?

Nil-£75k       £75k-£1m       £1m-£3m       £3m-£8m       £8m-£15m       £15m-£25m  
 £25m-£40m       £40m-£60m       £60m-£100m       £100m-£150m       Over £150m

Please indicate the annual turnover covered by this return (please answer on behalf of your UK operation only)

£0-999k       £1-9.9m       £10-24.9m       £25-99.9m       £100-499m       £500m+

Please enter the appropriate regional code according to the main geographic location of your manufacturing activities

(please see list below)

### Regional codes 1-11

#### Code 1

##### Wales (counties)

Flintshire  
Gwent  
Gwynedd  
Mid Glamorgan  
Powys  
South Glamorgan  
West Glamorgan

#### Code 2

##### Scotland (L A region)

Borders  
Central  
Dumfries and Galloway  
Fife  
Grampian  
Highland  
Lothian  
Strathclyde  
Tayside  
Islands

#### Code 3

##### Northern Ireland (borders)

Belfast  
South Eastern  
Southern  
North Eastern  
Western

#### Code 4

##### North East

Cleveland  
Durham  
Northumberland  
Tyne and Wear

#### Code 5

##### Yorkshire & the Humber

East Yorkshire  
(formerly Humberside)  
North Yorkshire  
South Yorkshire  
West Yorkshire

#### Code 6

##### East Midlands

Derbyshire  
Leicestershire  
Lincolnshire  
Northamptonshire  
Nottinghamshire

#### Code 7

##### East of England

Cambridgeshire  
Norfolk  
Suffolk  
Bedfordshire  
Essex  
Hertfordshire

#### Code 8

##### South East

Berkshire  
Buckinghamshire  
East Sussex  
Greater London  
Hampshire  
Isle of Wight  
Kent  
Oxfordshire  
Surrey  
West Sussex

#### Code 9

##### South West

Bath & North East Somerset  
City of Bristol  
North Somerset  
South Gloucestershire  
Cornwall  
Devon  
Dorset  
Gloucestershire  
Somerset  
Wiltshire

#### Code 10

##### West Midlands

Hereford and Worcester  
Shropshire  
Staffordshire  
Warwickshire  
West Midlands (met. county)

#### Code 11

##### North West

Cumbria  
Cheshire  
Greater Manchester  
Lancashire  
Merseyside



The CBI supplies the European Commission with harmonised manufacturing data, derived from the industrial trends survey.  
The CBI acknowledges the European Union's financial support for the technical development and supply of this data.

Your company details please complete as fully as possible

Your name

Your position

Company name

Address

Postcode

Telephone

Email

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# Industrial trends survey

## Number 224b June 2017

Office use only:

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Welcome to the CBI monthly industrial trends survey. We would like to thank you for your valued support of the survey – providing us with a key insight into manufacturing conditions.

Please answer on behalf of your UK manufacturing operations only. If you have any questions, please do not hesitate to contact us at [surveymanagementgroup@cbi.org.uk](mailto:surveymanagementgroup@cbi.org.uk)

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Closing date: *Wednesday 14 June 2017.*

Thankyou very much in advance for your response.

**Anna Leach – head of economic intelligence**

### 1 Excluding seasonal variations, do you consider that in volume terms:

	above normal	normal	below normal	n/a
(a) Your present total order book is	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(b) Your present export order book is	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### 2 Your present stocks of finished goods are:

	more than adequate	adequate	less than adequate	n/a
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### 3 Excluding seasonal variations, what has been the trend over the **past** three months and what are the expected trends over the **next** three months with regard to:

		up	same	down	n/a
Volume of output:	Past three months	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Next three months	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### 4 Excluding seasonal variations, please indicate the expected trend over the **next** three months with regard to:

	up	same	down	n/a
Average selling prices at which domestic orders/sales are booked	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Numbers employed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please complete and return to the  
CBI survey management group by **Wednesday 14 June 2017**

Survey management group CBI Cannon Place 78 Cannon Street London EC4N 6HN  
T: +44 (0)20 7395 8081/8108 F: +44 (0)20 7836 1210/5856 Email: [surveymanagementgroup@cbi.org.uk](mailto:surveymanagementgroup@cbi.org.uk)

Please turn over to complete the questionnaire 

## Basic data section

Please enter the code number of the main manufacturing activity covered by this return. If unsure of your correct standard industrial classification, please state clearly below your main manufacturing activity

How many employees are covered by this return?

1-199      200-499      500-4,999      5,000 and over

                  

What is the annual ex-works value of your direct exports?

nil-£75k      £75k-£1m      £1m-£3m      £3m-£8m      £8m-£15m      £15m-£25m      £25m-£40m      £40m-£60m      £60m-£100m      £100m-£150m      over £150m

                                                            

Please indicate the annual turnover covered by this return (please answer on behalf of your UK operation only)

£0-999k      £1-9.9m      £10-24.9m      £25-99.9m      £100-499m      £500m+

                              

Please enter the appropriate regional code according to the main geographic location of your manufacturing activities (see list)

### Regional codes 1-11

#### Code 1

Wales (Counties)  
Gwent  
Gwynedd  
Mid Glamorgan  
Powys  
South Glamorgan  
West Glamorgan

#### Code 2

Scotland (L A Region)  
Borders  
Central  
Dumfries and Galloway  
Fife  
Grampian  
Highland  
Lothian  
Strathclyde  
Tayside  
Islands

#### Code 3

Northern Ireland (Borders)  
Belfast  
South Eastern  
Southern  
North Eastern  
Western

#### Code 4

North  
Cleveland  
Cumbria  
Durham  
Northumberland  
Tyne and Wear

#### Code 5

Yorkshire & the Humber  
East Yorkshire  
(formerly Humberside)  
North Yorkshire  
South Yorkshire  
West Yorkshire

#### Code 6

East Midlands  
Derbyshire  
Leicestershire  
Lincolnshire  
Northamptonshire  
Nottinghamshire

#### Code 7

East Anglia  
Camb  
Norfolk  
Suffolk

#### Code 8

South East  
Bedfordshire  
Berkshire  
Buckinghamshire  
East Sussex  
Essex  
Greater London  
Hampshire  
Hertfordshire  
Isle of Wight  
Kent  
Oxfordshire  
Surrey  
West Sussex

#### Code 9

South West  
Bath & North East Somerset  
City of Bristol  
North Somerset  
South Gloucestershire  
Cornwall  
Devon  
Dorset  
Gloucestershire  
Somerset  
Wiltshire

#### Code 10

West Midlands  
Hereford and Worcs.  
Shropshire  
Staffordshire  
Warwickshire  
West Midlands (met. county)

#### Code 11

North West  
Cheshire  
Greater Manchester  
Lancashire  
Merseyside



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Your company details **please complete as fully as possible**

Your name

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Address

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