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Strengthening the Foundations:
the Foundational Economy in the North East

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Simon Grove-White

Julian Boys

Oliver Chan

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Key findings

- The foundational economy (FE) is the backbone of the North East's regional economy, generating around £37bn in gross value added (GVA) and accounting for around 70% of economic activity, compared to just 20% from the IS-8 sectors identified in the government's new Industrial Strategy. It also employs over 600,000 people – four times more than IS-8 sectors.
- Because of its scale, the foundational economy has the greatest influence on regional growth and living standards.
- However, jobs in these sectors are often lower paid and less secure, with higher prevalence of zero-hours contracts and gender pay disparities, highlighting a critical area for policy intervention.
- Many foundational sectors are also highly extractive, with profits and control concentrated in large, often non-local firms (e.g. construction, care, food distribution, tourism, and housing), limiting local economic retention and community benefit.
- There is significant untapped leverage through public and anchor institution spending. Of £5.25bn spent annually, £3.78bn already flows into the foundational economy, yet only 8% reaches social economy organisations, while the majority goes to private sector suppliers.
- Rebalancing procurement and policy toward local, less extractive, and socially rooted providers could substantially improve economic resilience and inclusion.
- Strategic implication: Regional economic policy should prioritise strengthening the foundational economy as a central pillar, rather than focusing predominantly on IS-8 sectors, to drive more inclusive, resilient, and locally retained growth.

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Project context and aims

The North East Combined Authority has committed to strengthening the foundational economy through its Local Growth Plan, recognising its importance to economic growth, tackling child poverty, and delivering net zero. This includes working more closely with partners such as the Voluntary, Community, and Social Enterprise (VCSE) sector and anchor institutions to increase its impact.

Alongside this, the New Deal for North East Workers aims to improve job quality and employment outcomes across the foundational economy.

This report supports these ambitions by mapping the foundational economy across the North East. It sets out its role in the regional economy and labour market and examines its key subsectors and organisation types, making comparisons to the eight high-growth sectors defined in the government's Industrial Strategy, the IS-8. The report also analyses public sector spending in the region, mapping public sector procurement spending to identify where it flows into the foundational economy.

Creating Real Opportunity

The North East Local Growth Plan

2025-2035

North East Combined Authority | Kim McGuinness North East Mayor

Supporting growth of the foundational economy

We will also support other parts of our economy to reach their potential. This includes the foundational economy, which accounts for around half of employment, including jobs across the private, public and VCSE sectors. The goods and services that they provide, along with the unique role played by the VCSE sector in promoting social cohesion, are essential to creating strong and stable communities that provide a good quality-of-life and enable other businesses to thrive. Together, they are fundamental to creating long-term growth that is sustainable and fair to all.

Foundational economy

The foundational economy provides services and goods that are essential to everyday life.

This includes food, retail, energy, transport, construction, agriculture, care and education. It is the backbone of our economy, providing vital services and the supply chain to delivering wider growth in the region. It provides the building blocks which enable other businesses to thrive, and it is fundamental to supporting the delivery of wider growth. But its role is often under-recognised and employment in the sector can be relatively insecure.

Our local authorities, NHS trusts, universities, colleges and other large locally-based organisations are anchor institutions and key engines for growth. They are big employers and procurers, are conveners and facilitators of partnerships, and they help shape places. As a result they have a significant impact on the skills, employment and SME ecosystems, and the wider economy.

The foundational economy accounts for around half of employment in the region.

It is also a disproportionately high employer of women and offers more-flexible local and part-time employment opportunities which are particularly attractive to parents and those with caring responsibilities.

Many parts, including health and construction, are set for rapid growth.

But the foundational economy faces challenges around pay and progression opportunities, and not every part of the region has equal access to foundational services.

What does the North East's foundational economy look like?

The Foundational Economy is the essential infrastructure and everyday services which enable the rest of the economy to function (Foundational Economy Collective). It encompasses the sectors of the economy which provide goods and services that are essential to everyday life.

This project used a bespoke definition of the Foundational Economy based on priorities in the North East. The sectors covered are:

- Construction
- Housing and Accommodation
- Food Supply chain
- Health and care
- Tourism and Hospitality
- Utilities
- Retail
- Transport
- Public Administration
- Services and Recreation
- Education

(see appendix for full sector definitions)

When foundational sectors are stable, reliable, and universally accessible, they create the conditions in which more specialised, market-facing industries can grow.

Is profit extraction undermining the foundations of the economy?

This view of the foundational economy is consistent with Amartya Sen's capabilities-based approach, which shows that economic development depends on expanding people's real freedoms: secure housing, dependable utilities, and quality care services – all essential prerequisites for participation in economic life.

Strong foundations reduce household risk, support labour market participation, enable learning, and underpin community cohesion. Conversely, when these systems are fragmented or under-resourced, prosperity in the wider economy becomes unstable.

Investment trends illustrate the growing pressures on these essential sectors. CBRE Investment Management advises institutional investors to target "beds" sectors – residential, student housing, and other accommodation, reflecting the shift in investment away from industrially productive sectors toward stable returns in foundational sectors.

In Our Lives in Their Portfolios, Brett Christophers shows that when these sectors are owned by private equity, long-term public value suffers, leading to under-investment, deteriorating service quality, rising costs, and heightened vulnerability.

If private equity investment continues to flow unchecked into these sectors, we risk undermining the foundations of our collective wellbeing and long-term prosperity.

The foundational economy employs four times as many people as the IS-8 industrial strategy sectors in the North East

The foundational economy represents **73%** of all employment in the North East (NECA area), with over 600,000 employees.

This compares to just 18% – around 150,000 employees – for the eight high-growth industrial strategy sectors, the IS-8.

Therefore, improving employment and life outcomes for people living in the North East depends on improving the pay and conditions of workers in the foundational economy.

Source: ONS BRES.
NB: Geographic area is that covered by NECA Local Authorities

Public sector-led services make the biggest contributions to foundational economy employment

When we break the foundational economy down by subsectors, we find that public services like health, care, and education are the biggest employers.

Health and care is the single biggest employer with nearly 140,000 employees – nearly as many as all IS-8 sectors combined.

Private sector-led industries which are also major employers in the region are food supply, retail, construction and housing.

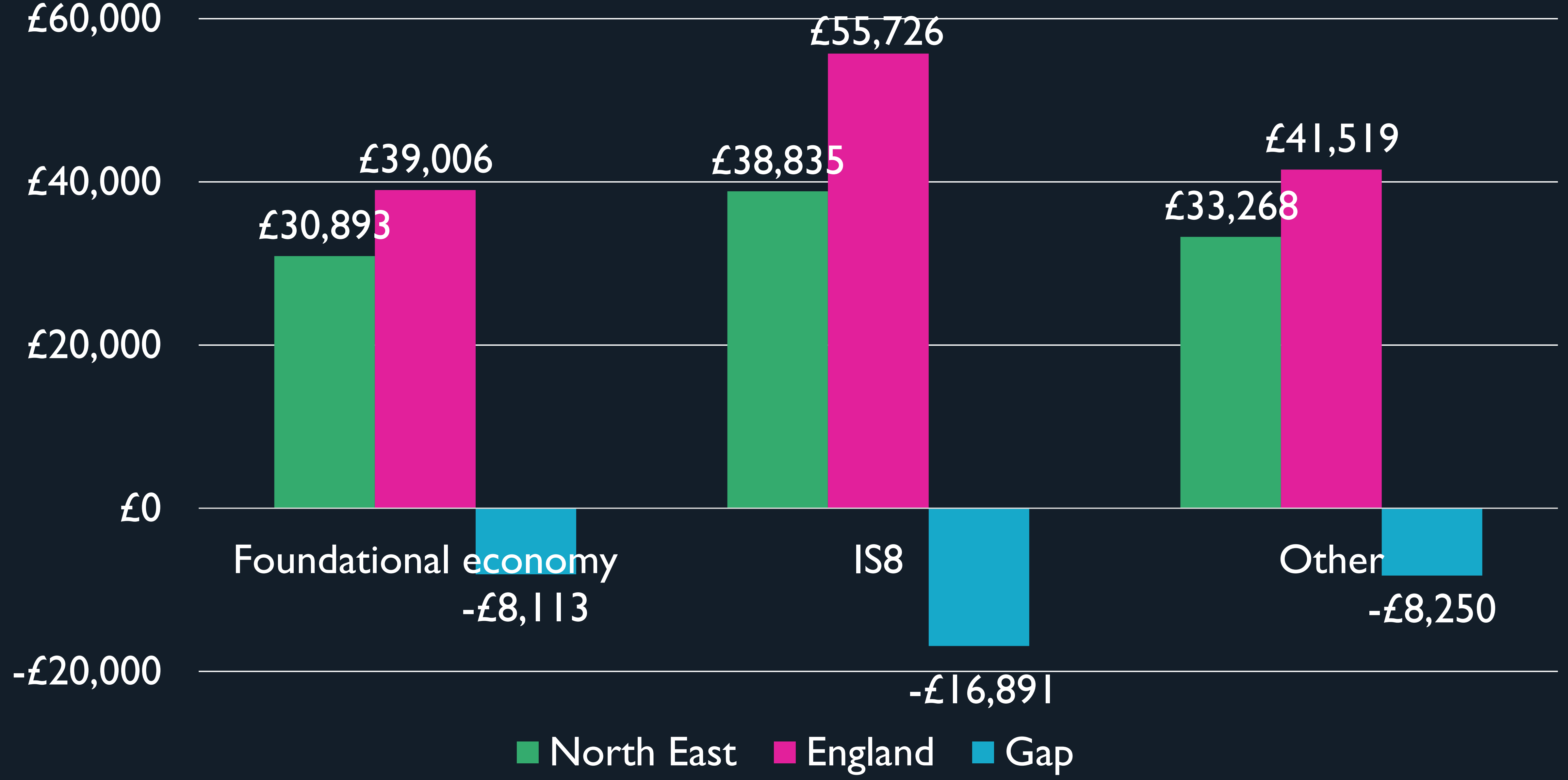
Source: ONS BRES.
NB: Geographic area is that covered by NECA LAs

Pay in the foundational economy is lower than in the IS-8, but the gap is smaller in the North East than elsewhere

Annual salaries in the North East are lower than the rest of England across all sectors, and workers are paid more in the IS-8 than in the Foundational Economy.

However, the gap between workers in the North East and England is less in FE sectors than the IS-8. FE workers in the North East earn nearly 80% of England levels, compared to 70% for the IS-8.

Mean annual salaries by sector, 2025 (£m)



Source: ONS ASHE analysis of pay by sector based on two-digit SIC codes, the most granular level available for the North East

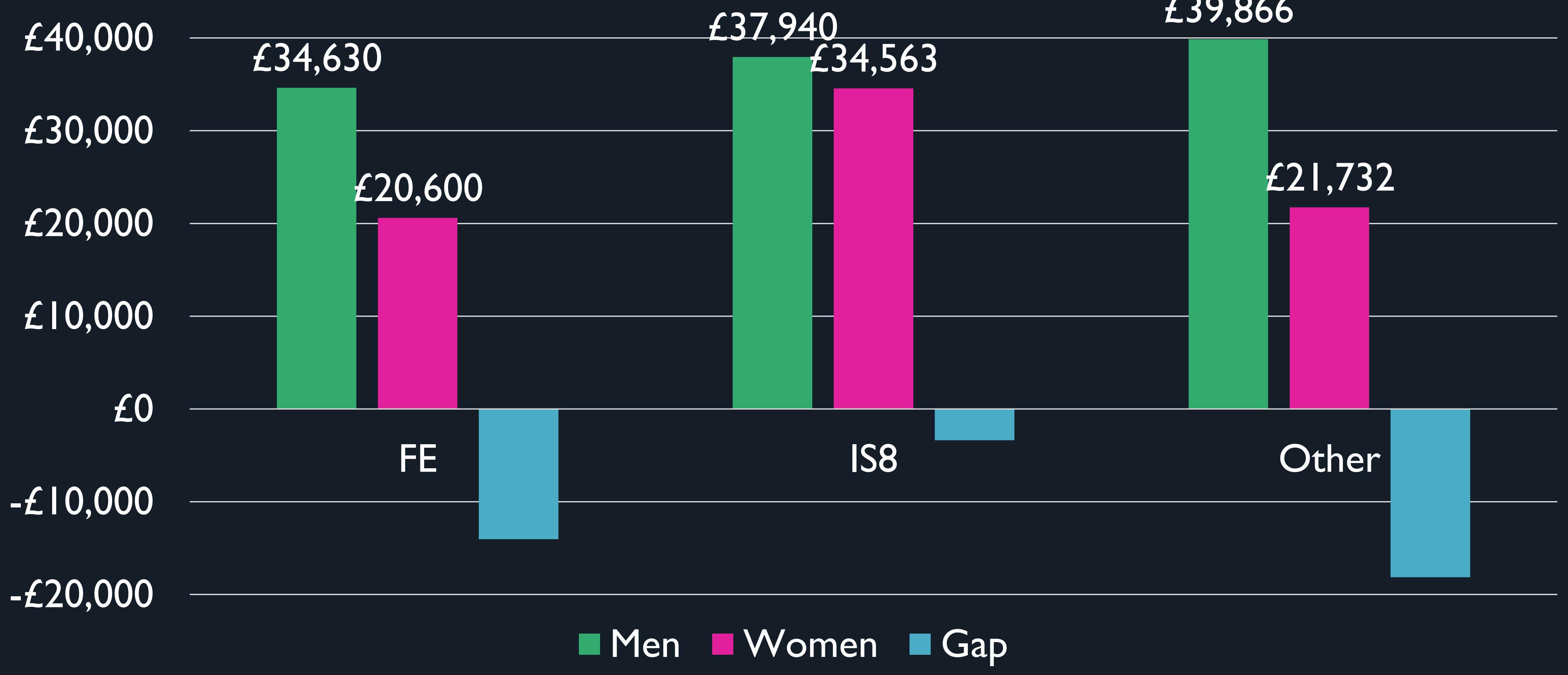
NB: Geographic area is the North East region defined at ITL1 level

Women working in the foundational economy earn around 60% of the annual income of men

The gender earnings gap is larger in the foundational economy than in other sectors. Women earn on average 59% of the salary of men in foundational economy sectors compared to 91% in the IS-8 and 55% in other sectors.

This likely reflects the economy-wide gender pay gap but also the number of hours worked and sectoral differences. Women make up a disproportionate part of the workforce in lower-paid sectors like social care and retail. These sectors are also more likely to use part-time contracts.

Mean annual salaries by gender and sector in the North-East, 2025 (£)



Source: ONS ASHE analysis of pay by sector based on two-digit SIC codes, the most granular level available for the North East
NB: Geographic area is the North East region defined at ITL1 level

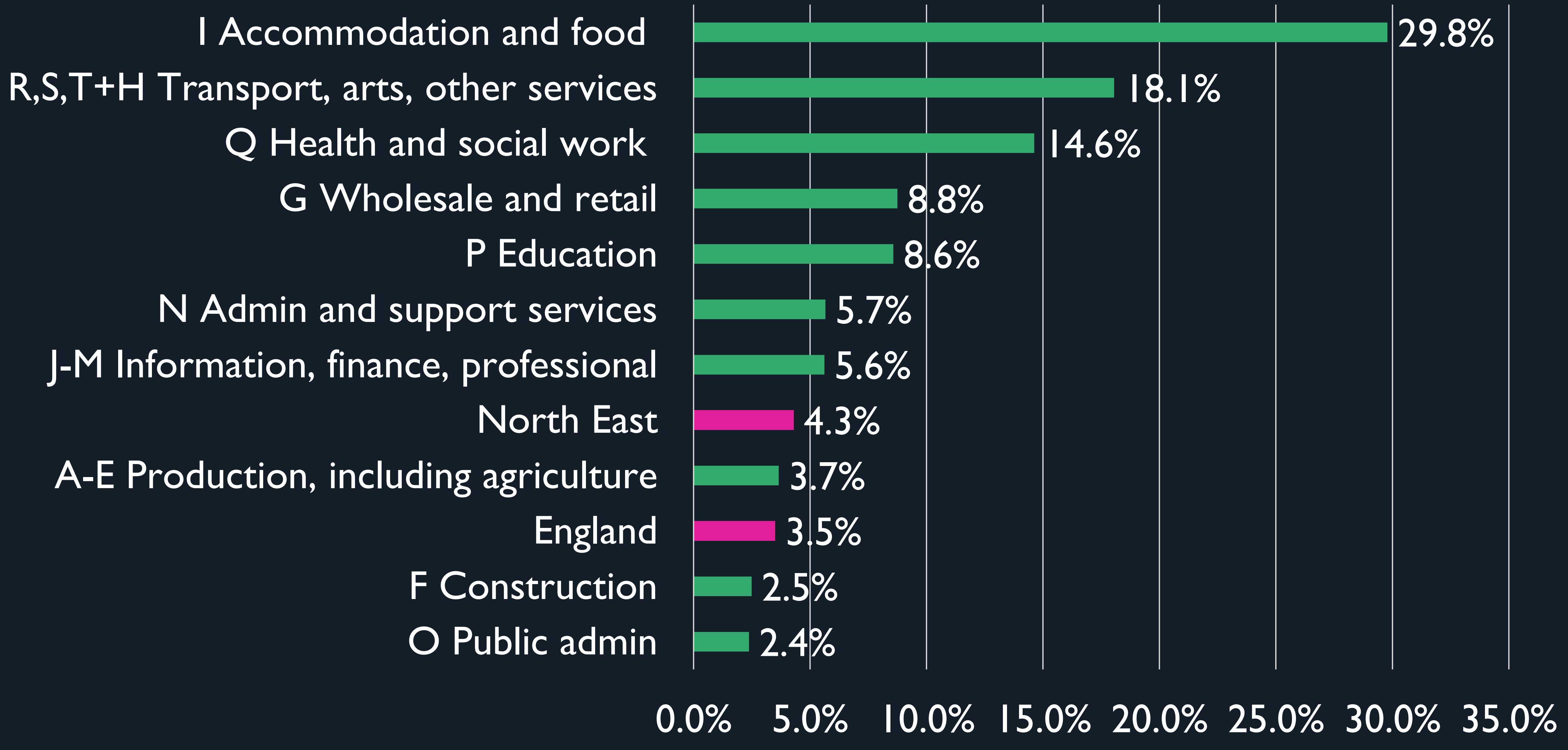
Workers in the North East's foundational economy are more likely to be on zero-hour contracts

Data for England suggests that foundational economy sectors like food, health and social work have a higher share of people on zero hours contracts than in IS-8 sectors like information, finance, and professional services

Workers in the North East overall are more likely to be on zero-hour contracts compared to England, so it is likely that the proportion of foundational economy workers on zero-hour contracts is higher in the North East.

Zero-hour contracts can be a trap for workers who find themselves unable to shift to more secure work conditions. They have also been linked to poor health and inequalities for women and black and minority ethnic (BAME) people.

People aged 16 and over on zero-hours contracts by industry (Standard Industrial Classification), 2025



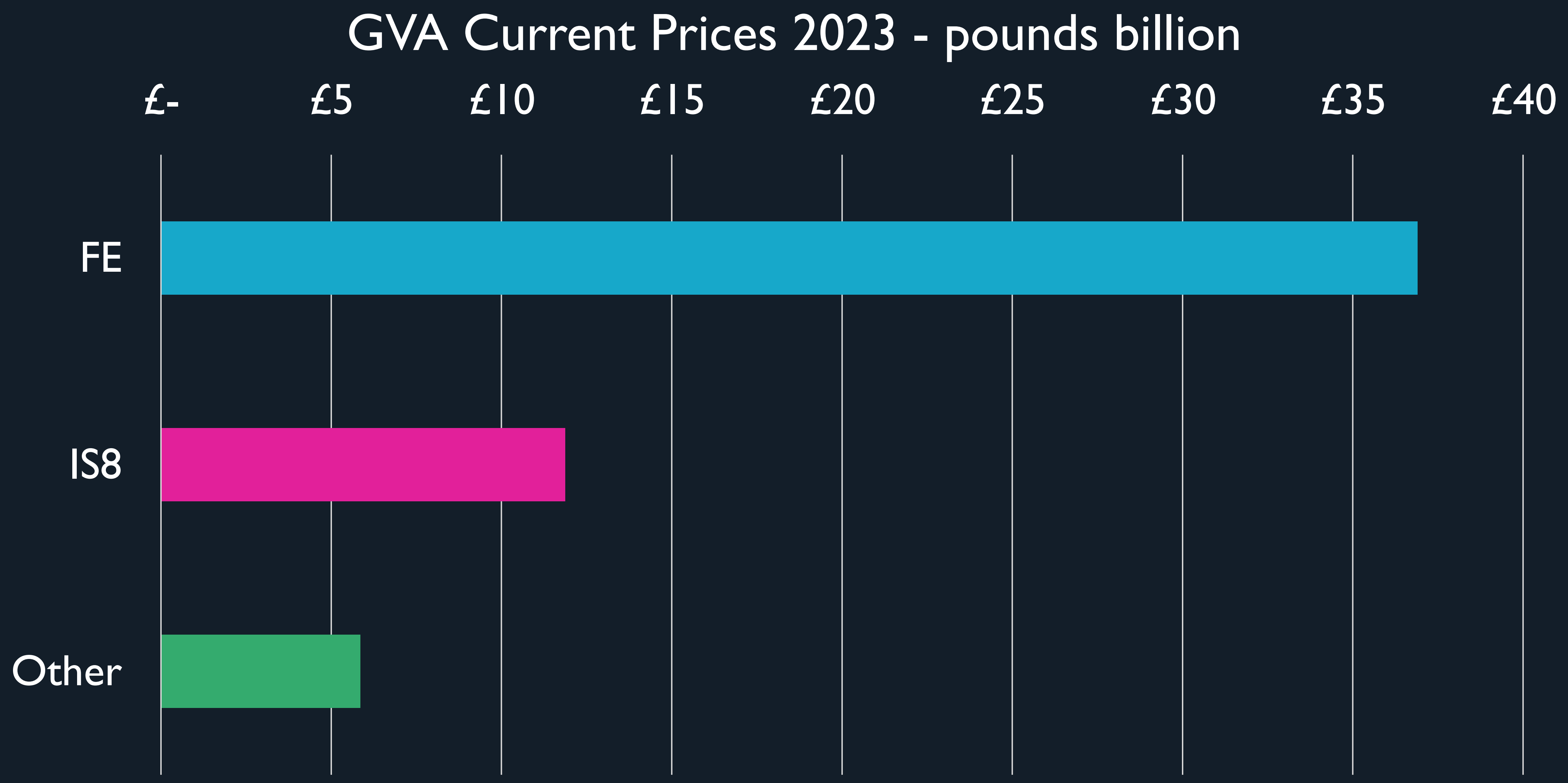
Source: ONS LFS data for England. SIC code sections are the most granular level available for this data.

The foundational economy contributes £36.9 billion to the North East CA region's economy, over two-thirds of GVA

Foundational economy sectors contribute £36.9 billion to the North East's economy, i.e. 68% of the region's gross value added (GVA). This is less than its contribution to employment (73%), likely due to lower pay in the FE.

The IS-8 sectors account for a far lower proportion of GVA than the foundational economy, at 22% of the total (around £12bn). By contrast we estimate that the IS-8 contributes around 30% of GVA in Greater Manchester and 40% in London.

NB: sectors and geography have been defined at SIC section level (rather than 5-digit SIC codes) due to data availability.



Source: ONS Regional gross value added (balanced) by industry
NB: Geographic area is that covered by NECA Local Authorities

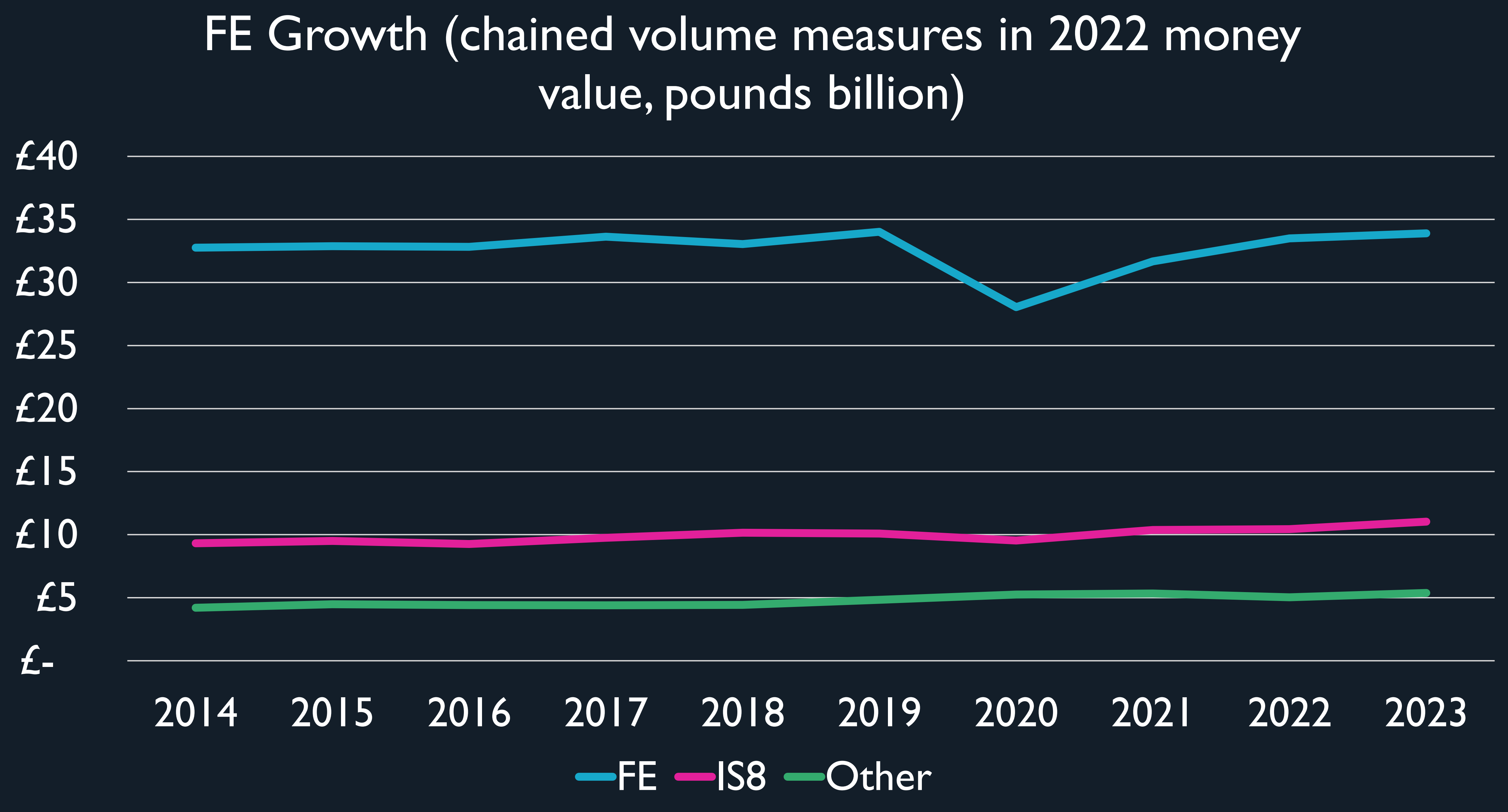
The foundational economy grew faster than IS-8 sectors post-Covid, and has an outsized impact on overall growth

The foundational economy provides resilience and stability, enabling the rest of the economy to function and grow.

In the three years after Covid, the FE grew by 21% (compared to 16% for the IS-8), reaching pre-pandemic GVA levels.

Over the most recent 10 years for which this data is available, the FE grew by 3.5% while the IS-8 grew by 18.5%. However, because it is bigger, the FE accounted for 28% of overall growth, while the IS-8 accounted for 43%.

Given their relative sizes, to make the overall economy grow by 1%, the FE sector would have to grow by 1.5% while the IS-8 would have to grow by 4.5%.



Source: ONS Regional gross value added (balanced) by industry
NB: Geographic area is that covered by NECA Local Authorities

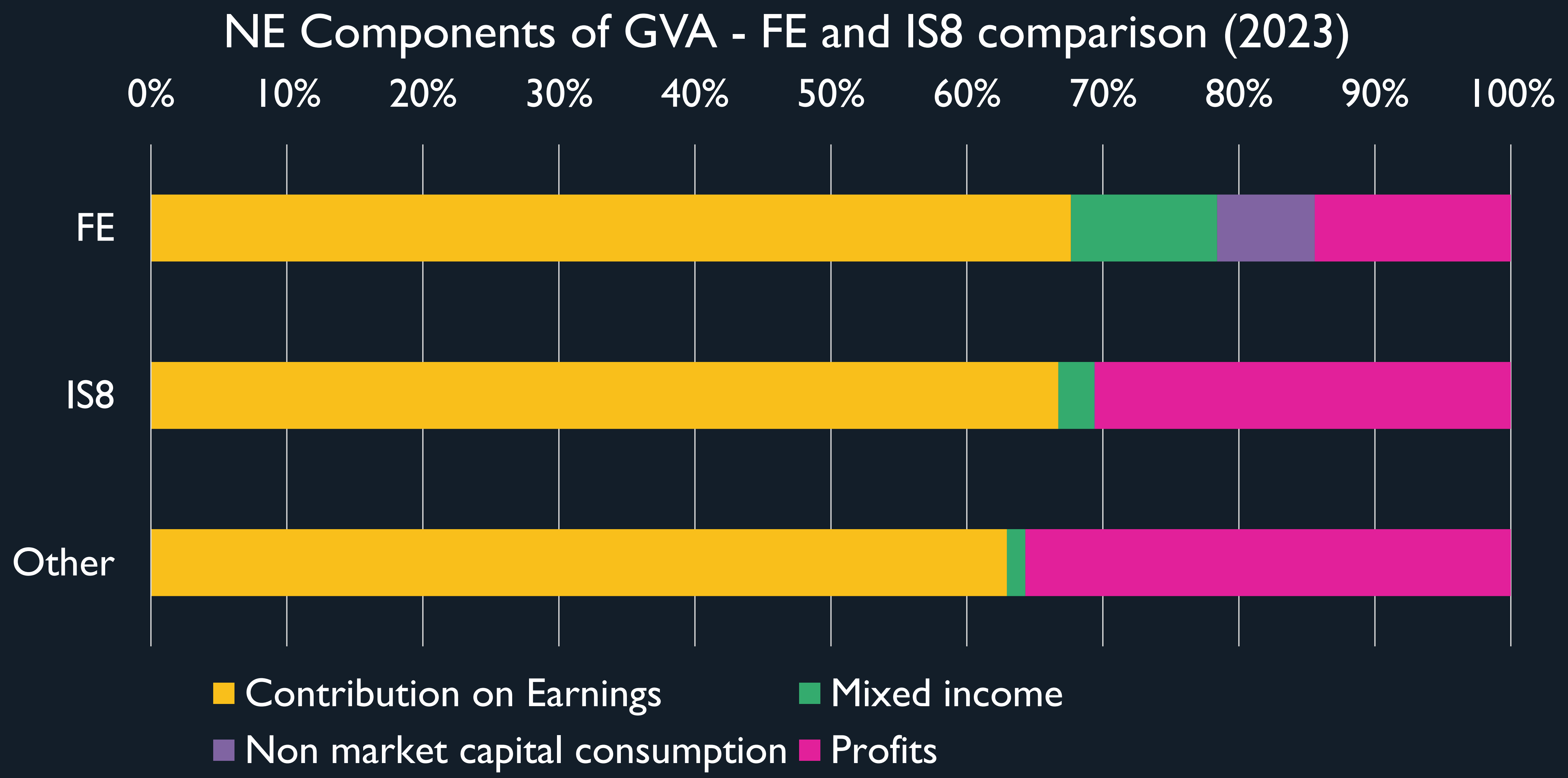
GVA in the North East's foundational economy is mostly employee pay, with a smaller share of profit than IS-8 sectors

Gross value added (GVA) in the North East's foundational economy is nearly 70% compensation of employees; profits make up 14% of the total. Profits make up a higher share of GVA in the IS-8 sectors (31%).

Mixed income (primarily self-employment earnings) is significantly higher in the foundational economy than other sectors.

GVA measures economic activity and can be categorised as compensation of employees (wages and salaries), gross operating surplus (profits), mixed income (self-employed earnings) and non-market capital consumption (depreciation of capital assets).

Regional GVA components data is only available at Industrial Section level. Inclusion in FE/IS-8/other categories is based on whether the majority of a Section contained 5 digit sectors in that category.



Source: ONS

NB: Imputed rents component has been removed from this chart for clearer comparison. Geographic area is the North East region defined at ITL1 level

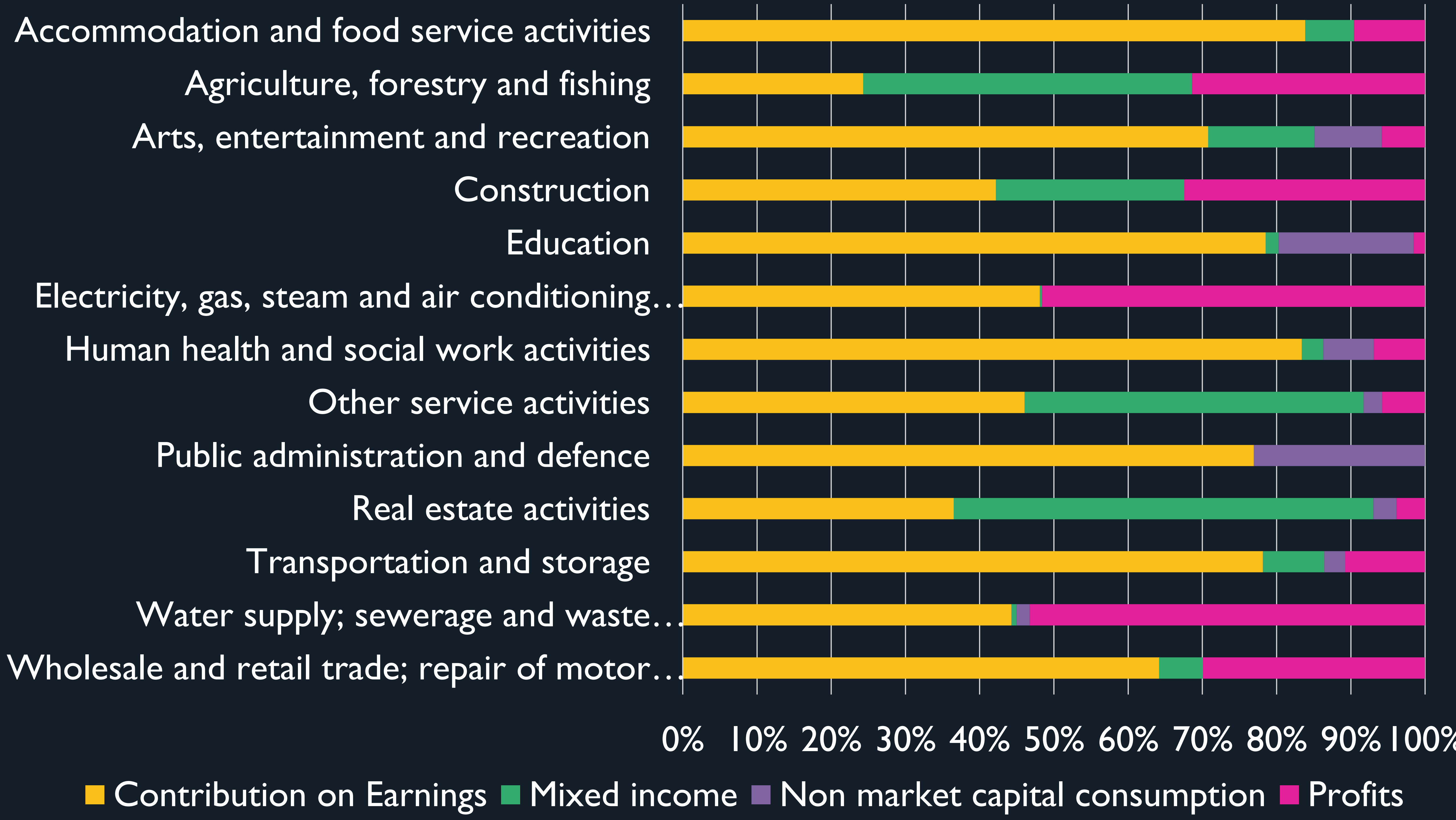
GVA components vary significantly across subsectors

Breaking this down to subsectors, we see that some foundational economy subsectors' GVA is over 80% employee earnings, e.g. accommodation and food services; health and social work. For others it is much lower, e.g. in agriculture it is closer to 25%.

The majority of the ‘mixed income’ contribution comes from three sectors – real estate, agriculture, and other service activities. These are all sectors with significant proportion of self-employment earnings.

The highest profit share among FE sectors is in the utility sectors, which employ relatively few people and enjoy a regulated monopoly on provision. This makes them a highly attractive investment vehicle for private equity.

Components of GVA by sector



Source: ONS. NB: Imputed rents component has been removed from this chart. Geographic area is the North East region defined at ITL1 level

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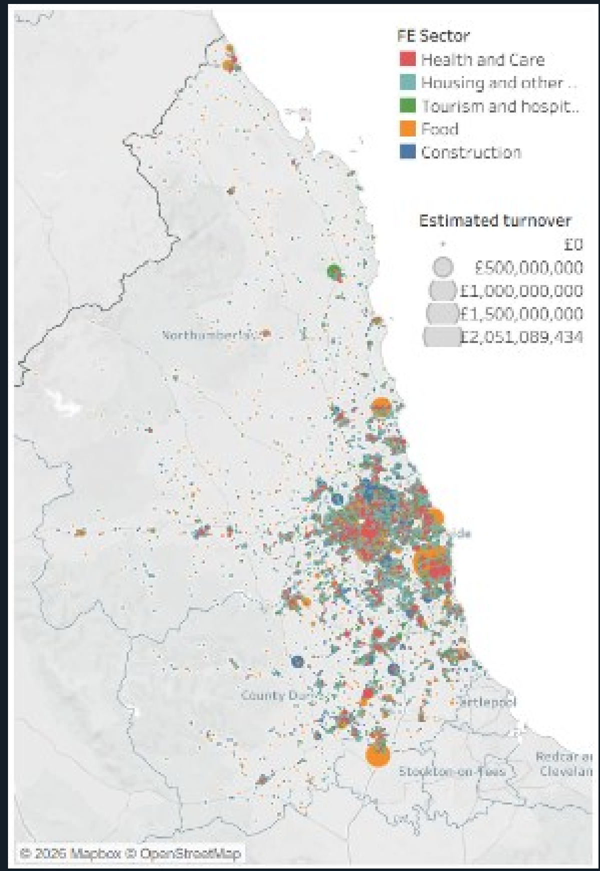
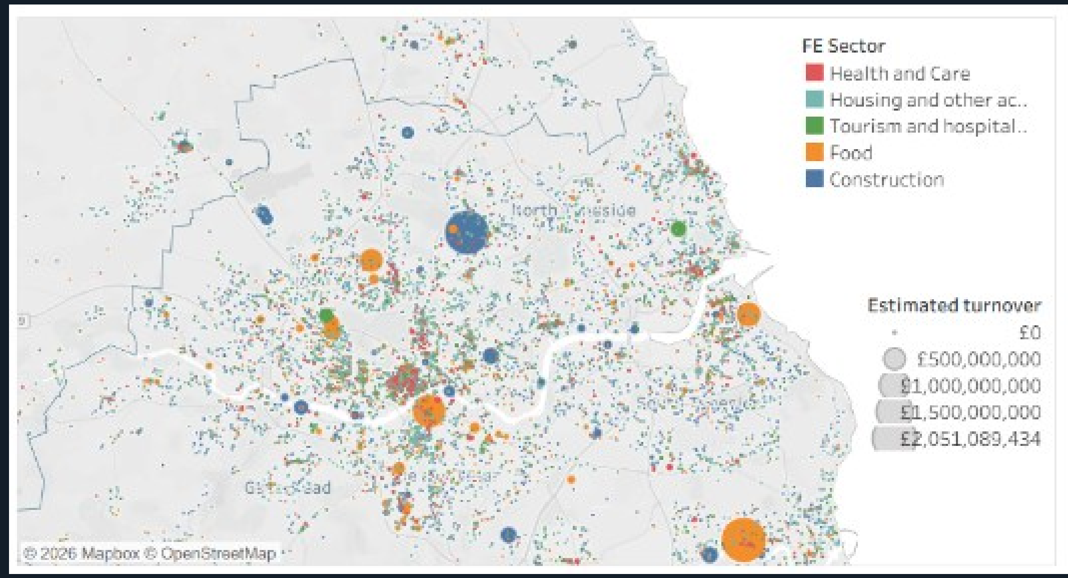
Analysis of priority foundational economy sectors for the North East explored the distribution of employment, profits, and turnover

We looked in more depth at the composition of five key sectors, using Companies House data from the Data City. This provides a company level view of the composition of these sectors, allowing us to look at company scales, types and characteristics. We aggregated the company level data against our sector categories, looking at employment, turnover, company ownership and control, and company type.

Although the companies house data isn't comprehensive (detailed accounting information is unavailable for SMEs) it provides a strong aggregate picture of the shape and distribution of economic activity within the sectors.





Sector	Number of companies	Estimated employees	Estimated turnover	Estimated Profits (2023)
Construction	9,146	39,856	£10,772m	£529m
Food Supply Chain	3,847	60,042	£14,665m	£193m
Health and Care	2,377	55,760	£3,124m	£214m
Housing and Accommodation	10,141	16,050	£1,782m	£568m
Tourism and Hospitality	5,497	45,439	£3,369m	£108m
Total	**30,742**	**215,325**	**£33,570m**	**£1,612m**

Source: Companies House via The Data City – all variables are from October 2025, except profits which is most reliably reported for 2023

Businesses within sectors were divided into further sub-categories to better reflect their economic function in the real world

We looked at the number of companies, employees, and turnover across these subsectors within the foundational economy, looking for indication of where turnover, profit and employment concentrated.

For the sector as a whole, we identified whether companies were:

- Majority NE located – more than 50% of a company's registered locations are in the North East region.
- Social Economy - a non-profit company type (CIC, No Share Capital)
- Parent controlled – subsidiary of a parent company
- Overseas parent – parent company located outside the UK mainland.

Construction

Construction and Development

Specialist Trades

Tourism and Hospitality

Hotels and other accommodation

Food and Drink

Housing and Accommodation

Housing

Other accommodation

Food Supply chain

Production

Distribution

Health and Care

Health

Care

Sector	Employees per company	Turnover per employee	Profit per employee	Reported profit as % of turnover
Construction	4.4	£270,283	£13,264	5%
Food Supply Chain	15.6	£244,243	£3,211	1%
Health and Care	23.5	£56,029	£3,840	7%
Tourism and hospitality	8.3	£73,986	£2,480	3%
Housing and other accommodation	1.6	£111,015	£35,385	32%

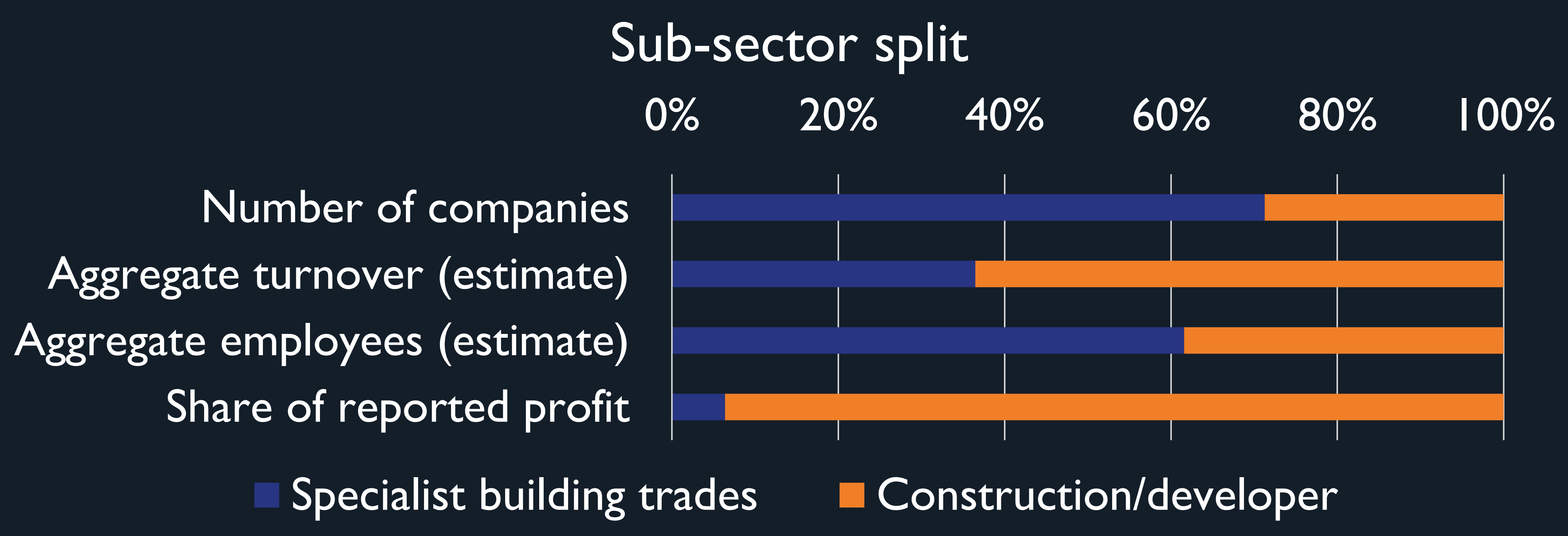
Source: Companies House via The Data City – all variables are from October 2025, except profits which is most reliably reported for 2023

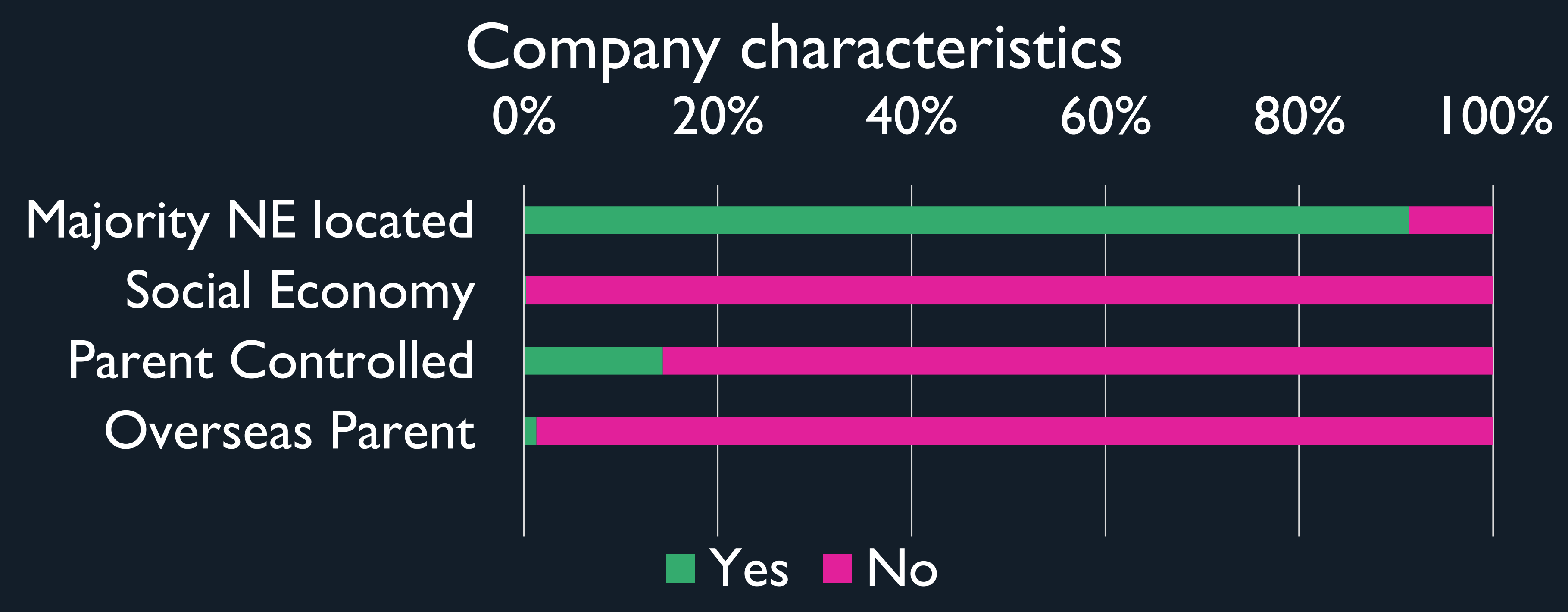
Construction: turnover & profits are weighted towards development companies, whilst employment is higher in specialist trades

More people are employed in specialist building trades, but turnover and profits concentrate among construction/development companies. This reflects the nature of subcontracting arrangements within the sector with intense competition among specialist trades, suppressing wages and working conditions at the lower tiers, whilst opportunity, profits and turnover accrue at the upper tier - see The Farmer Review for further analysis.

Of the top 25 companies by turnover, only 5 are engaged in specialist building trade sectors. Those top 25 companies account for 61% of all turnover in the construction sector as a whole.

Across the sector most companies are profit-making PLCs, with very few social economy organisational types. The most profitable companies in the sector tend to be parent owned, which may suggest profits are less likely to remain in the region.





Source: Companies House via The Data City – all variables are from October 2025, except profits which is most reliably reported for 2023

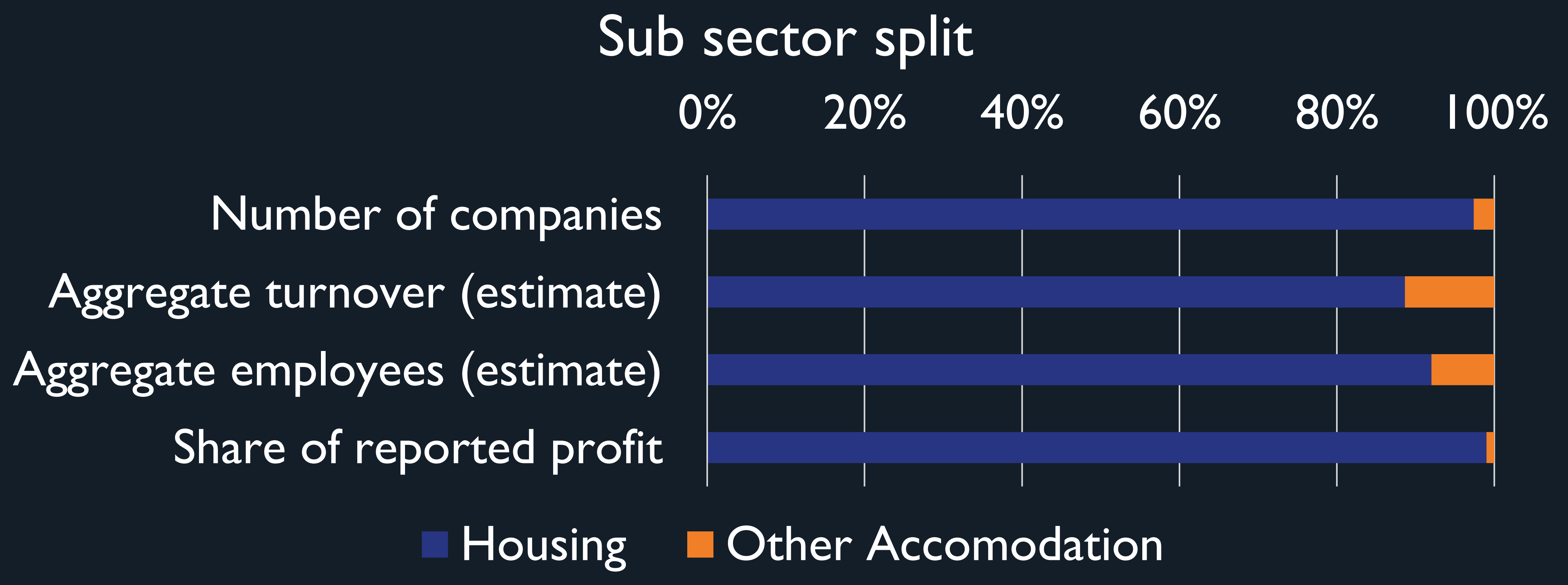
Housing and accommodation: high profit and low employment with profits concentrating among parent owned companies

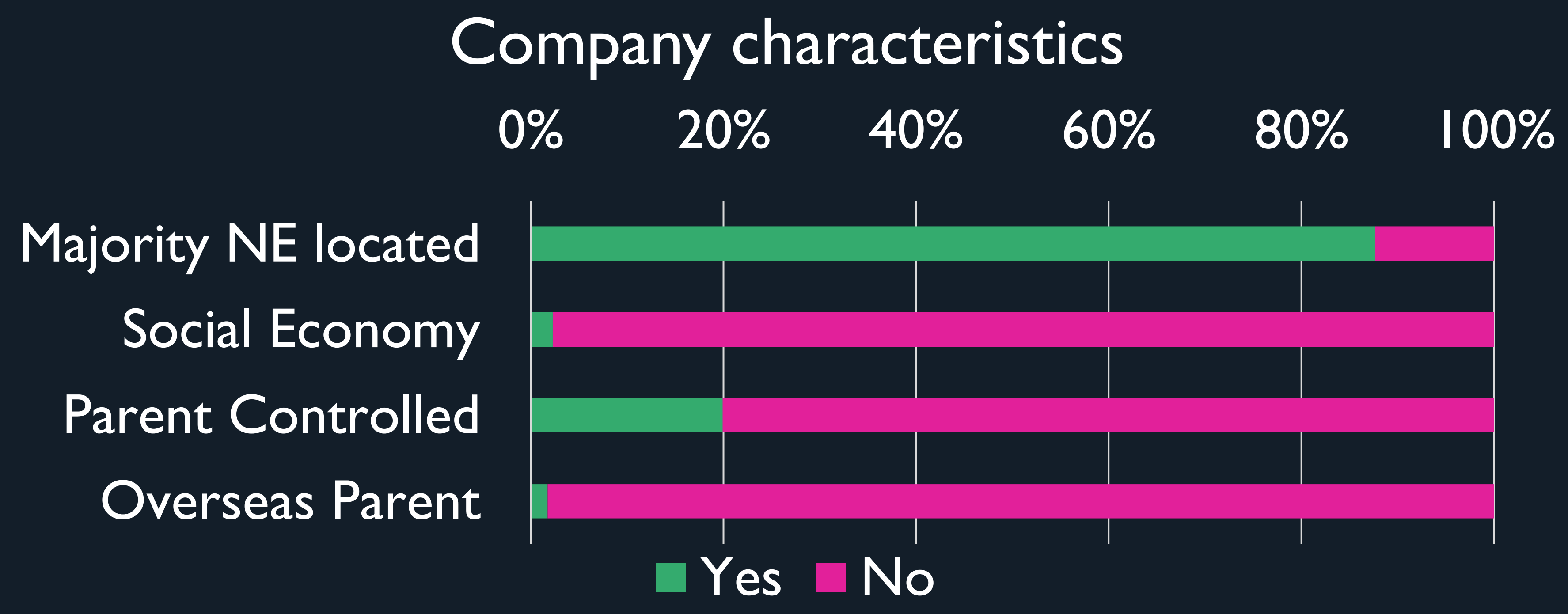
Compared to other sectors, Housing and accommodation is characterised by low employment and high turnover and profit levels. The sector employs just 1.6 people per company location and has an estimated £35k profit for every person employed.

The top 25 companies in this sector represent nearly 50% of reported turnover. For reported profit this is even more concentrated, with 89% of 2023 profits going to the top 25 most profitable companies.

Although 20% of companies are parent owned across the sector, almost all reported profits in this sector go to parent owned companies, with just 1% of reported profit going to non-parent owned companies.

See RORE Community Led Housing Report for further analysis and policy responses.





Source: Companies House via The Data City – all variables are from October 2025, except profits which is most reliably reported for 2023

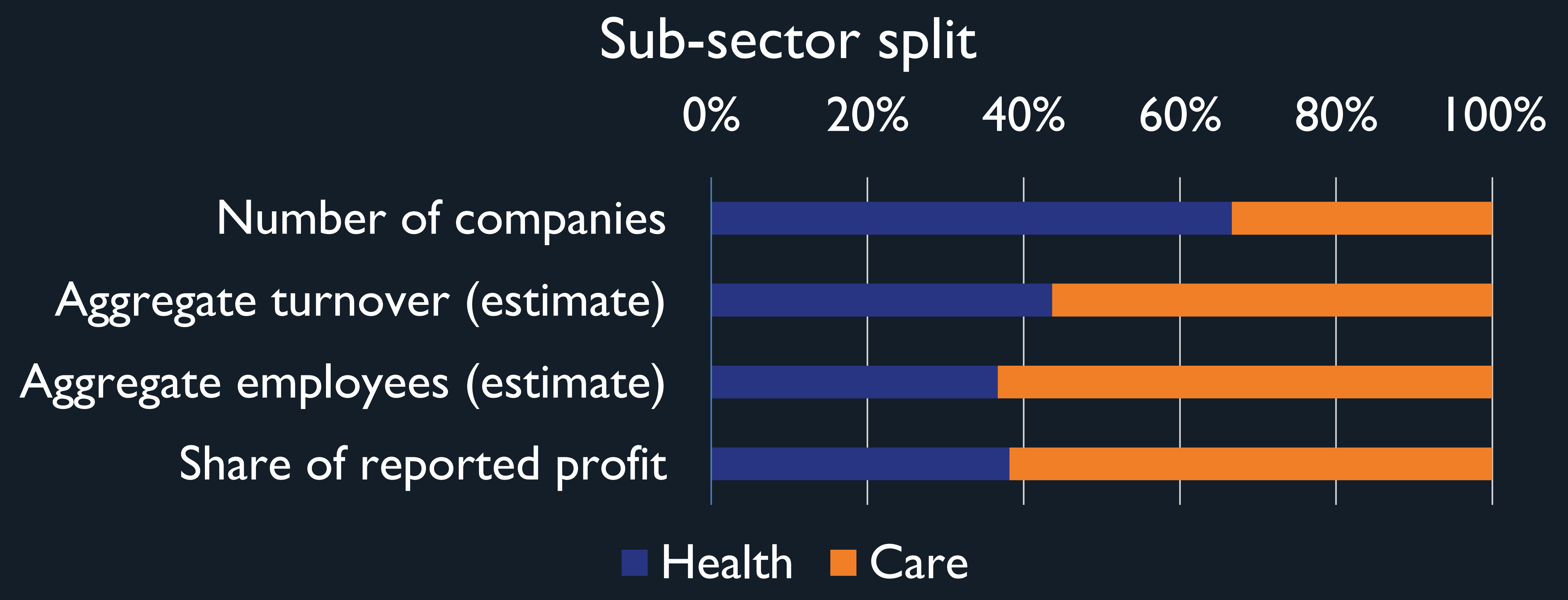
Health and Care: High employment but significant extraction through parent ownership and financialised organisation types

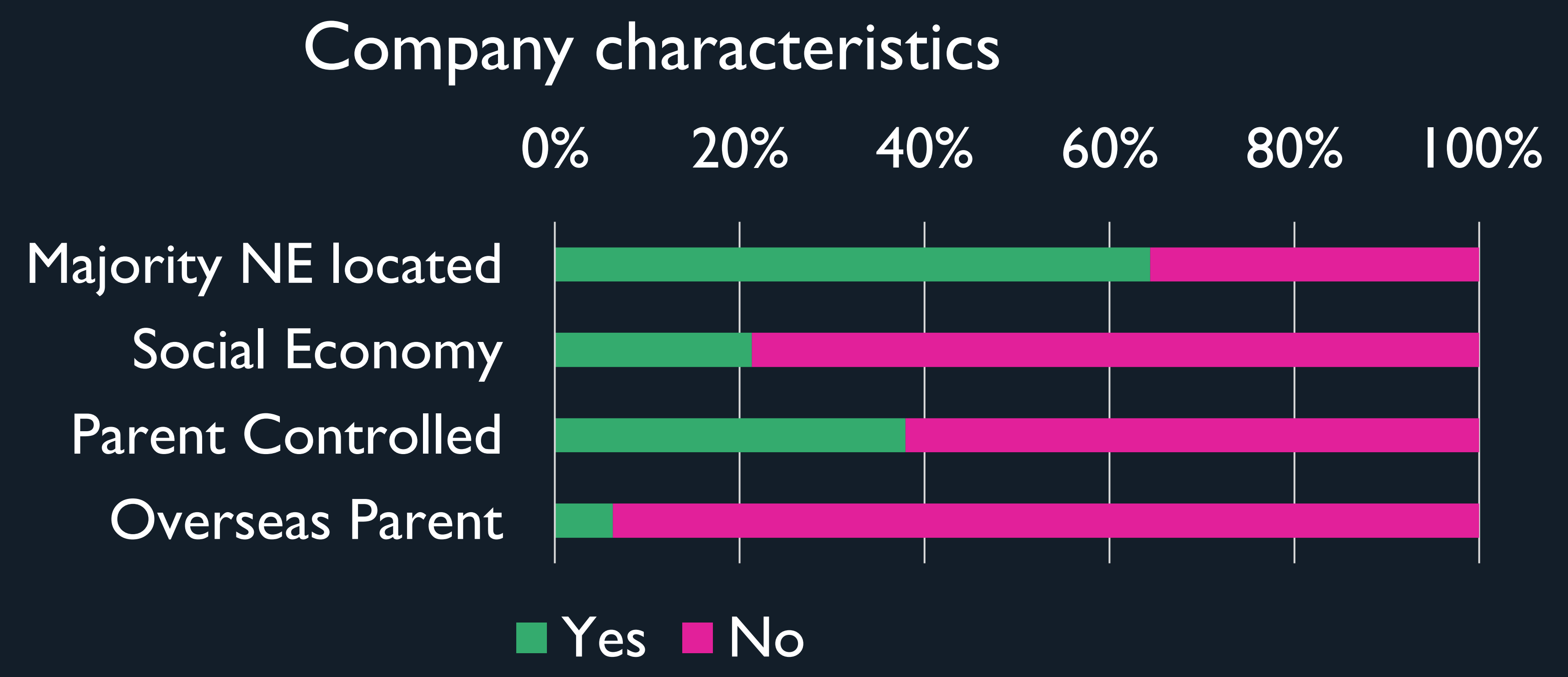
Health and care is characterised by a high employment ratio, with 23 people employed per company location.

Across the subsectors of Care and Health, profit, turnover and employment are higher in Care than Health, whilst Health represents a higher proportion of the companies listed.

Parent ownership is significant in this sector with nearly 40% of organisations being controlled by a larger group. These companies accounted for 68% of all reported profits in this sector in 2023. These reported profits are highly concentrated, with over £150m profit reported for the top 25 most profitable companies – 70% of all reported profits for the sector.

There is a higher proportion of Social Economy organisations operating in these sectors than in others looked at. See RORE - Ending extraction in the UK care system for more on the sector.





Source: Companies House via The Data City – all variables are from October 2025, except profits which is most reliably reported for 2023

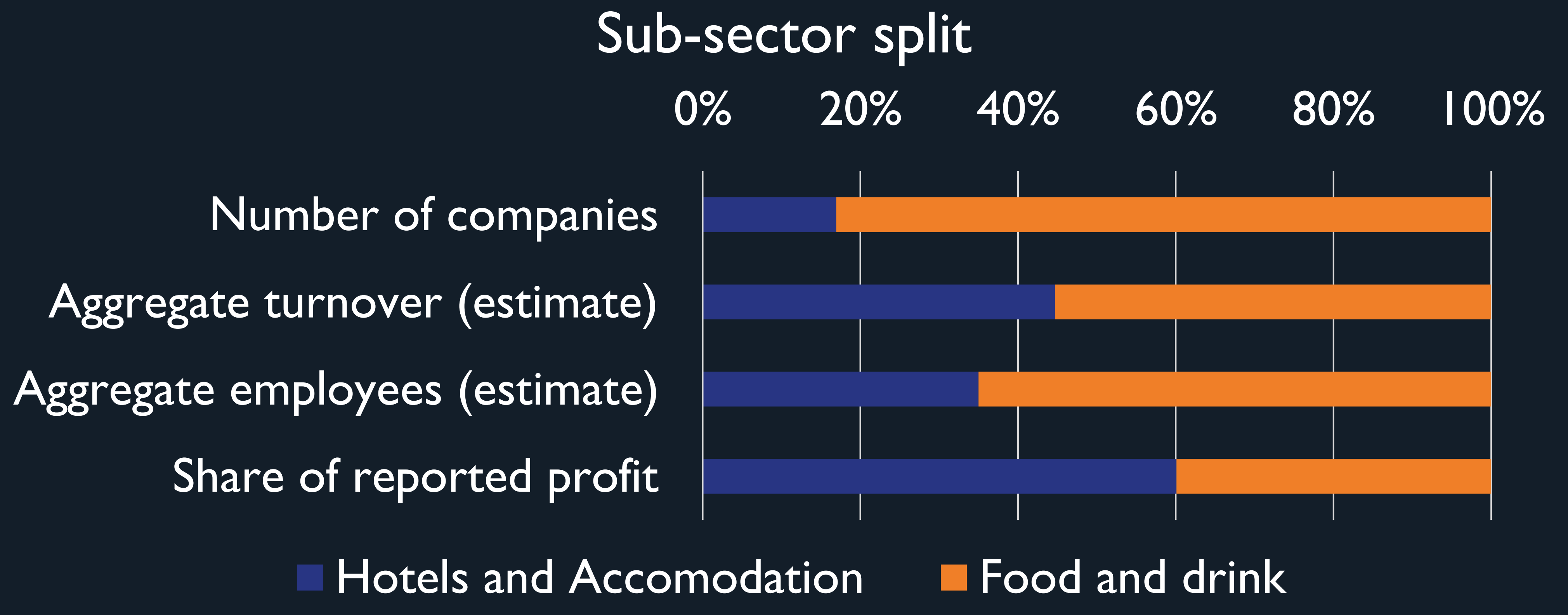
Tourism and Hospitality: economic activity in this sector is dominated by a handful of large group-owned chains

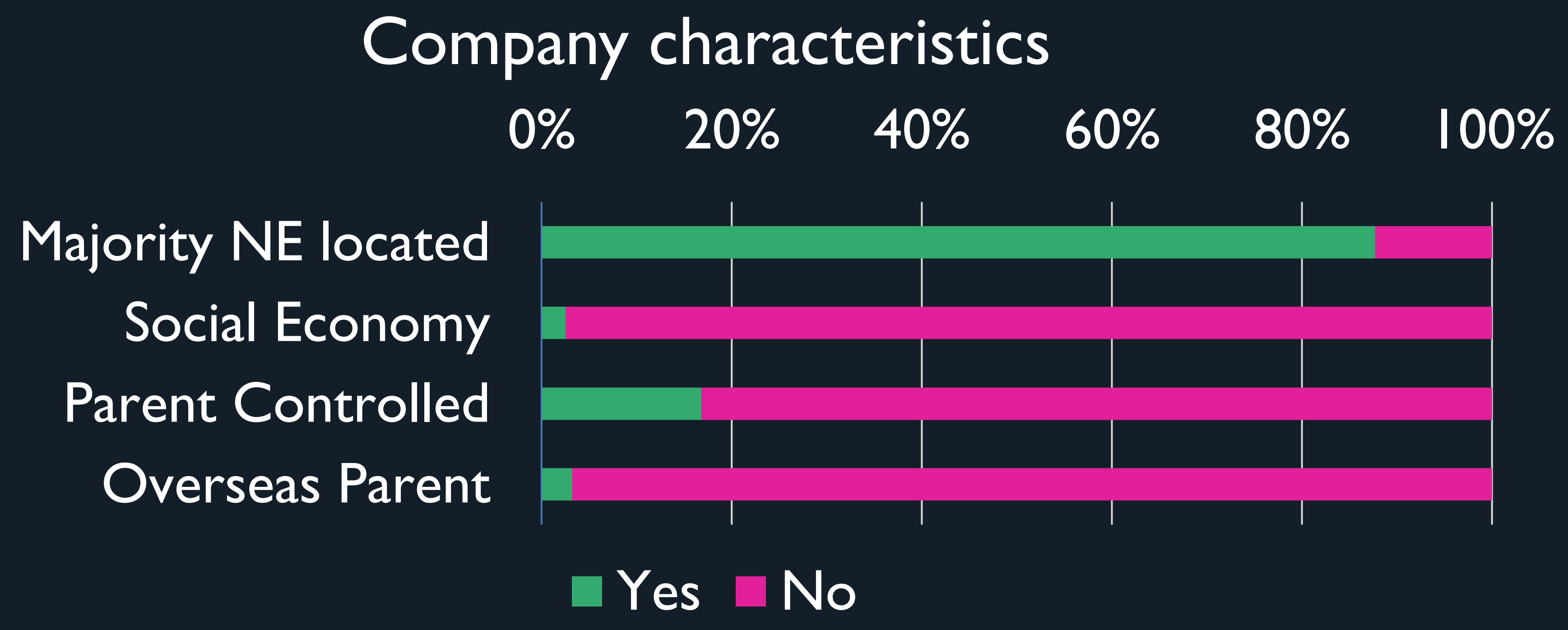
Although this sector is a significant employer in the region, profits, turnover and employment are highly skewed towards a small number of powerful groups.

The top 25 companies by reported profit (2023), operate in 262 locations, and generated an estimated £98m in profit.

Within the Hotels and Accommodation sector, 64% of companies operate independent of parent control. However, these independent companies account for just 13% of turnover, and 3% of reported profits.

Within the Food and Drink sector, 48% of estimated turnover is through the 25 most profitable companies, 19 of which are parent owned.





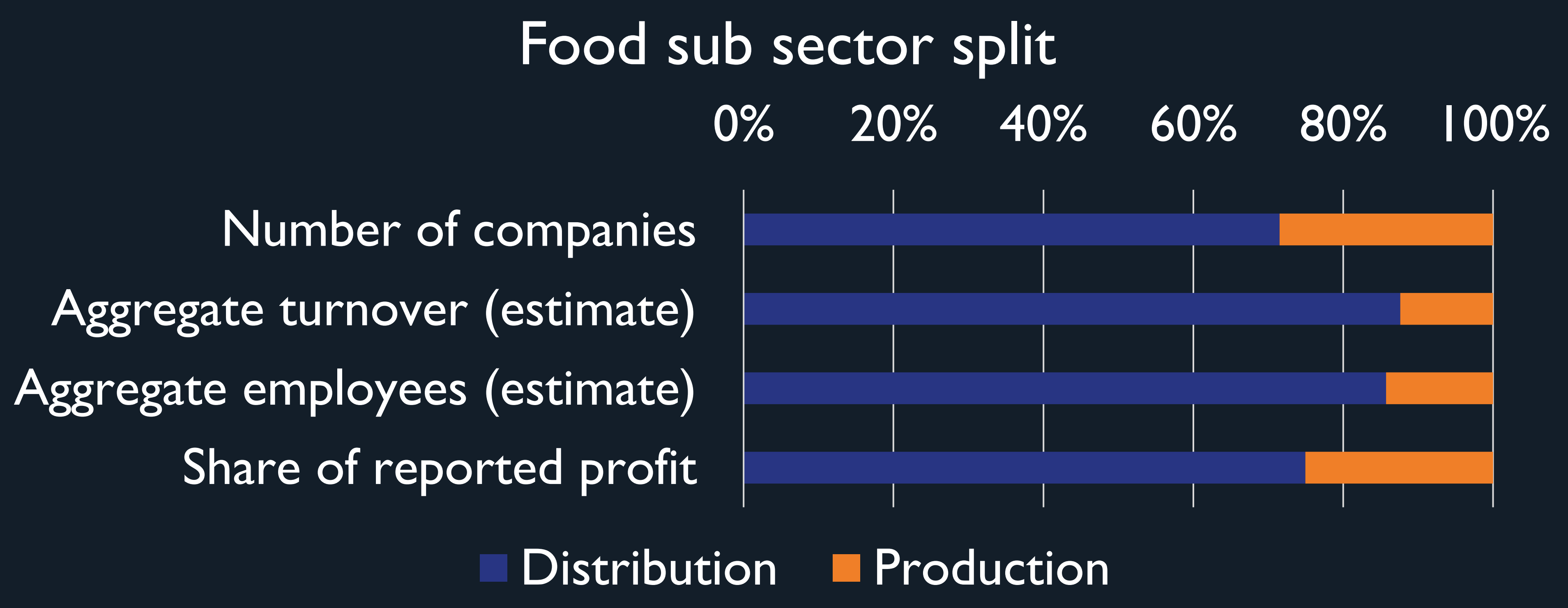
Source: Companies House via The Data City – all variables are from October 2025, except profits which is most reliably reported for 2023

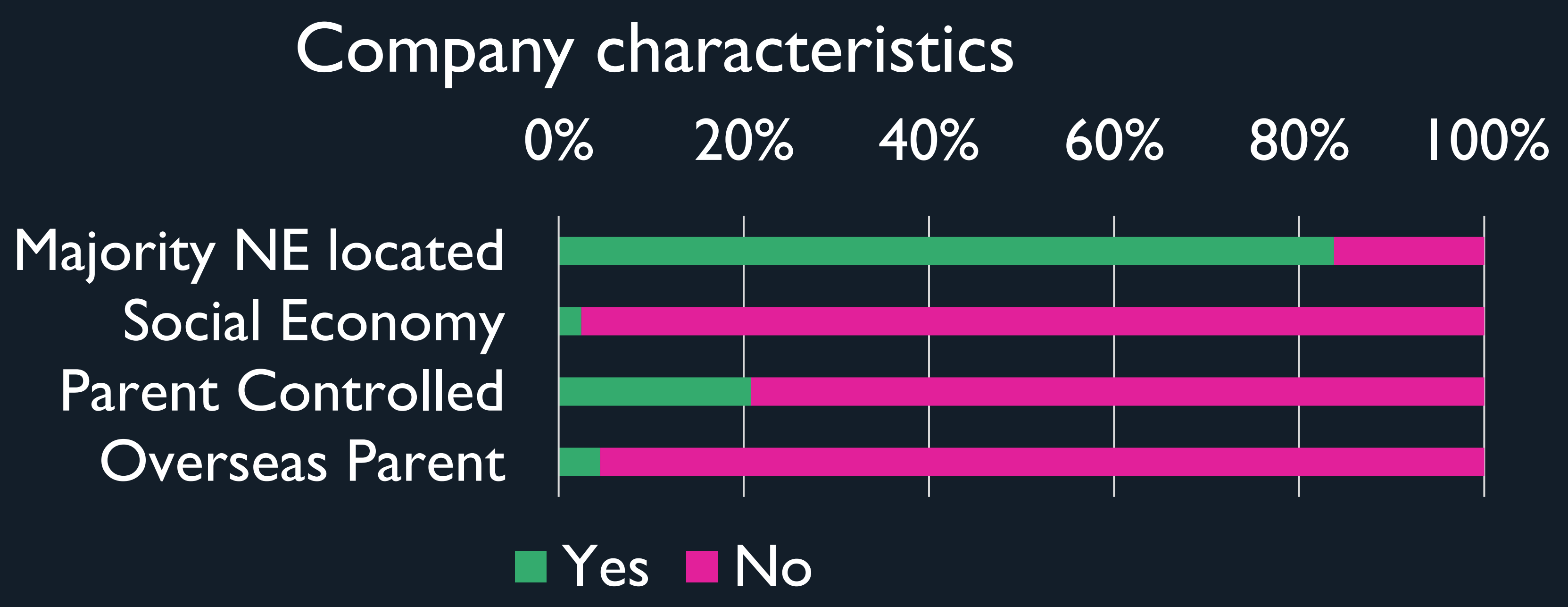
Food Supply Chain: economic activity is heavily skewed towards food distribution, specifically the major supermarket chains

Food supply chain has been subdivided into production (agriculture and manufacture), and distribution (retail and wholesale). Production makes up a relatively small proportion of all variables, reflecting the fact that the North East is (like the UK as a whole) a net importer of food.

Turnover, profit and employment are highly concentrated in food distribution sectors, reflecting the dominance of the supermarkets in the food system as a whole.

57% of reported turnover across all food sectors goes through just 10 companies – 9 of which are supermarkets. This gives them significant economic power to influence the production and consumption markets, such as in their supply chains.





Source: Companies House via The Data City – all variables are from October 2025, except profits which is most reliably reported for 2023

Across the key FE sectors in the NECA region an estimated £205m in profit is made by companies with an overseas parent company

Source: Companies House via The Data City

The North East's economy is not meeting foundational needs

The function of the foundational economy is to meet the foundational needs of people, rather than growth targets or the interests of investors. Yet in the North East:

- Child poverty has increased: a 44% increase in child poverty for working households since 2010 (TUC)
- In 2024, approximately 123,000 households or 10% of the total were experiencing fuel poverty (DESNZ)
- Nearly one in four households the North East, 23%, are experiencing food insecurity (N. Echo)
- Housing unaffordability is increasing, with the North East experienced the greatest annual price rise in the UK (ONS)
- Rough sleeping in the North East increased by 39% year-over-year (Emmaus)

The above statistics are all signs of an economy that prioritises the short-term imperatives of profit over the long-term needs of people, with minor variations across selected sectors:

- **Housing and Accommodation**: Investment-led housing development prioritises financial returns over community needs. This inflates land values, drives speculation, and undermines affordability.
- **Construction**: Skilled and unskilled local workers are often trapped in low-margin, insecure roles while wealth, decision-making power, and policy influence accumulate among development companies.
- **Food**: Supermarket chains dominate the supply chain, squeezing farmers and producers with low prices while driving out smaller, local businesses. This leads to reduced food diversity, less resilience in supply chains, and communities becoming dependent on centralised distribution rather than locally rooted systems.
- **Tourism and Hospitality**: Market share is increasingly dominated by a handful of large hotel and restaurant groups, with profits and assets concentrating at the top of the distribution
- **Health and Care**: The increased influence of private equity investment is leading to reduced service quality, poor employment conditions and massive transfer of public wealth into private hands (see RORE).

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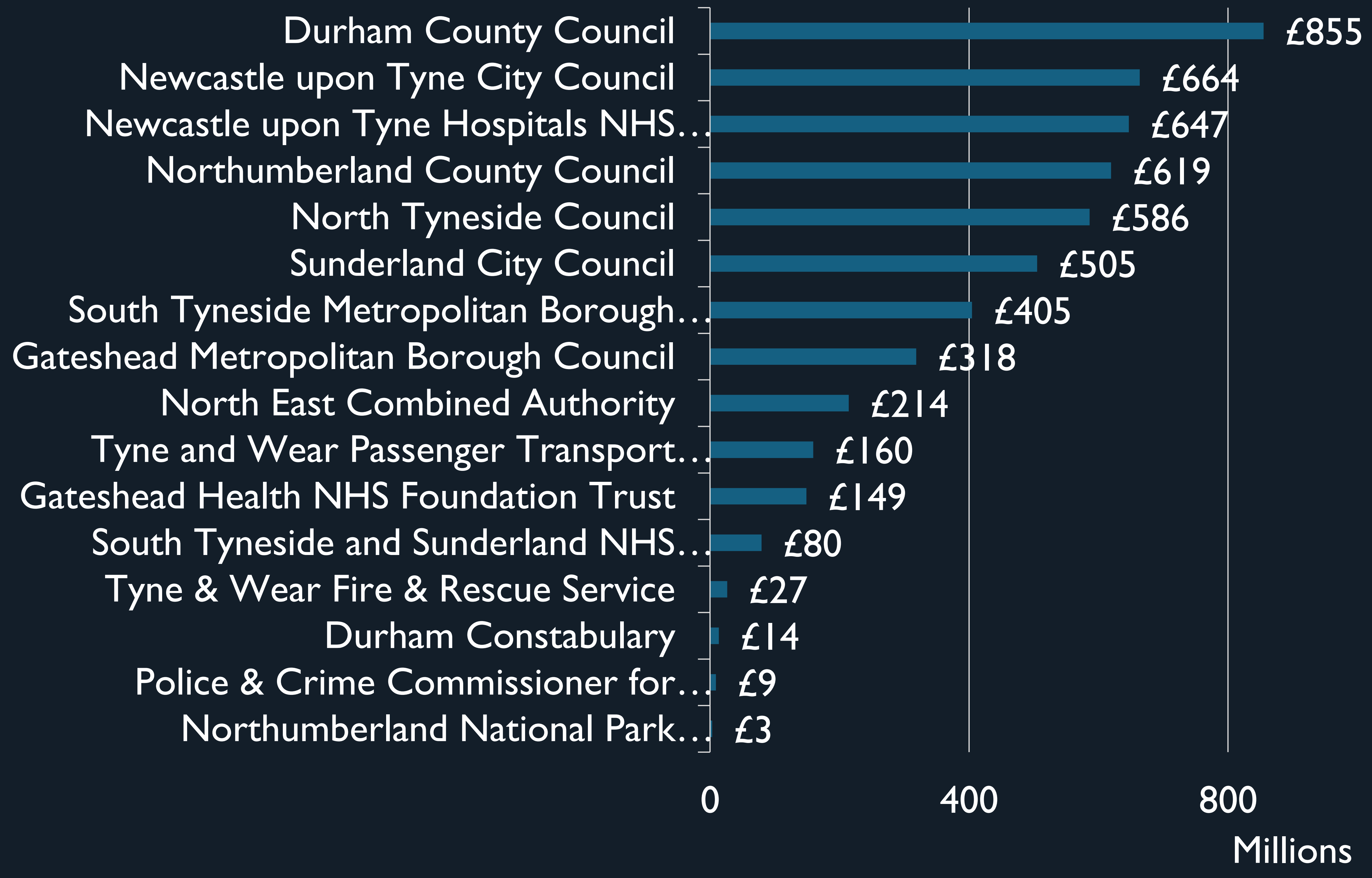
13 North East-based anchor institutions spent a total of £5.25bn in 2024-25, representing a huge regional economic opportunity

The North East Local Growth Plan notes that anchor institutions – mostly public sector bodies rooted in place such as local authorities, NHS trusts, universities, colleges, etc. – are key engines of growth due to their significant economic footprint in terms of employment and procurement.

We gathered procurement data for a sample of 13 North East-based anchor institutions. The third party spend of these 13 institutions alone totalled £5.25 billion in the 2024-25 financial year, representing a huge potential economic opportunity for the region.



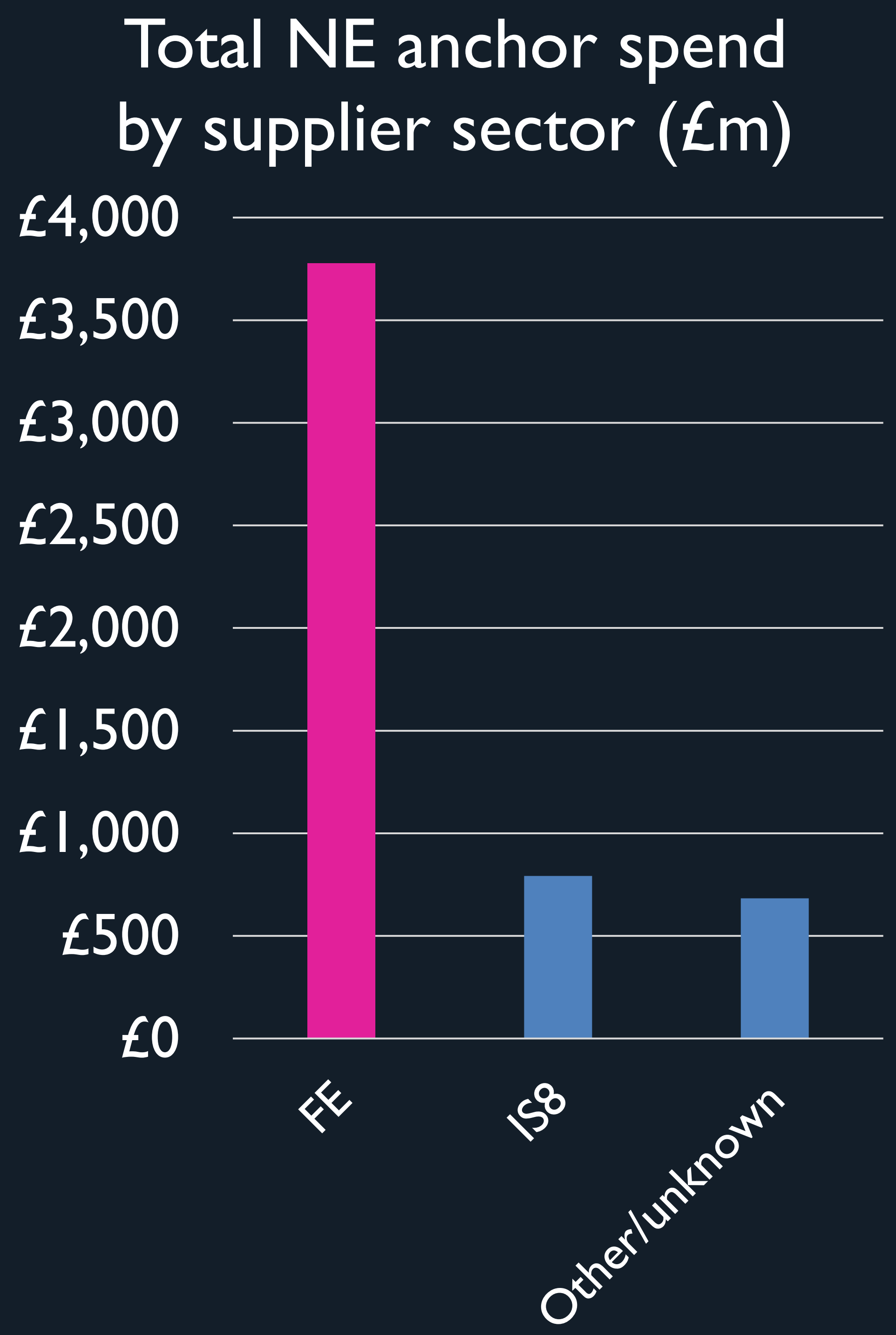
Source: Tussell

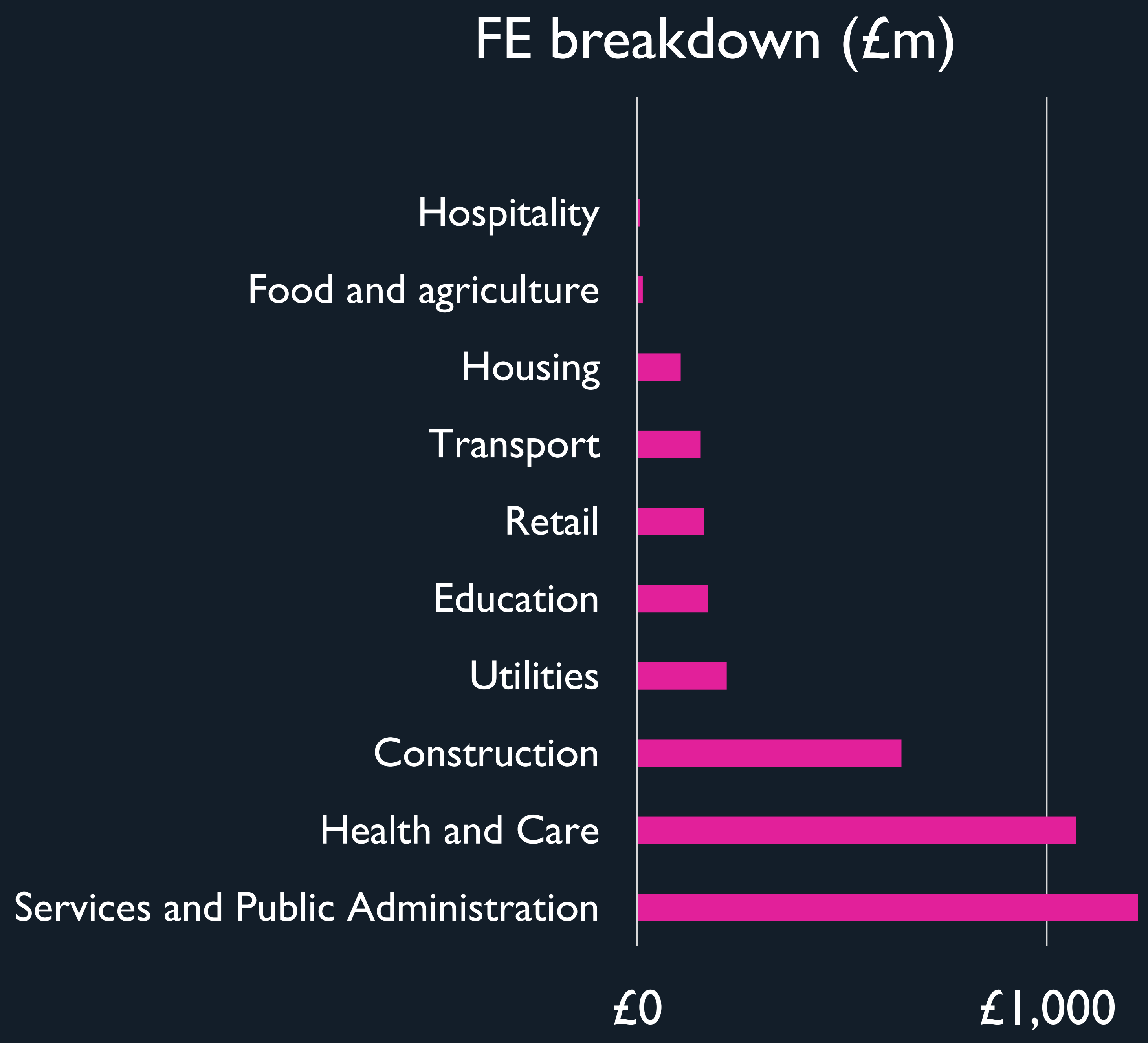
The 13 anchor institutions spent £3.78 billion in the foundational economy, giving them significant power to shape economic outcomes

The 13 North East anchors spent 72% of all third party spend with suppliers from the Foundational Economy, a total of £3.78bn.

This compares to only £0.8bn of spend with suppliers in the IS-8 sectors, or 15% of third party spend.

This gives public sector anchor institutions more power to shape employment conditions and supply chains in the foundational economy than in the IS-8 sectors, especially in public services, health and social care and construction – the top 3 FE subsectors for anchor spend.





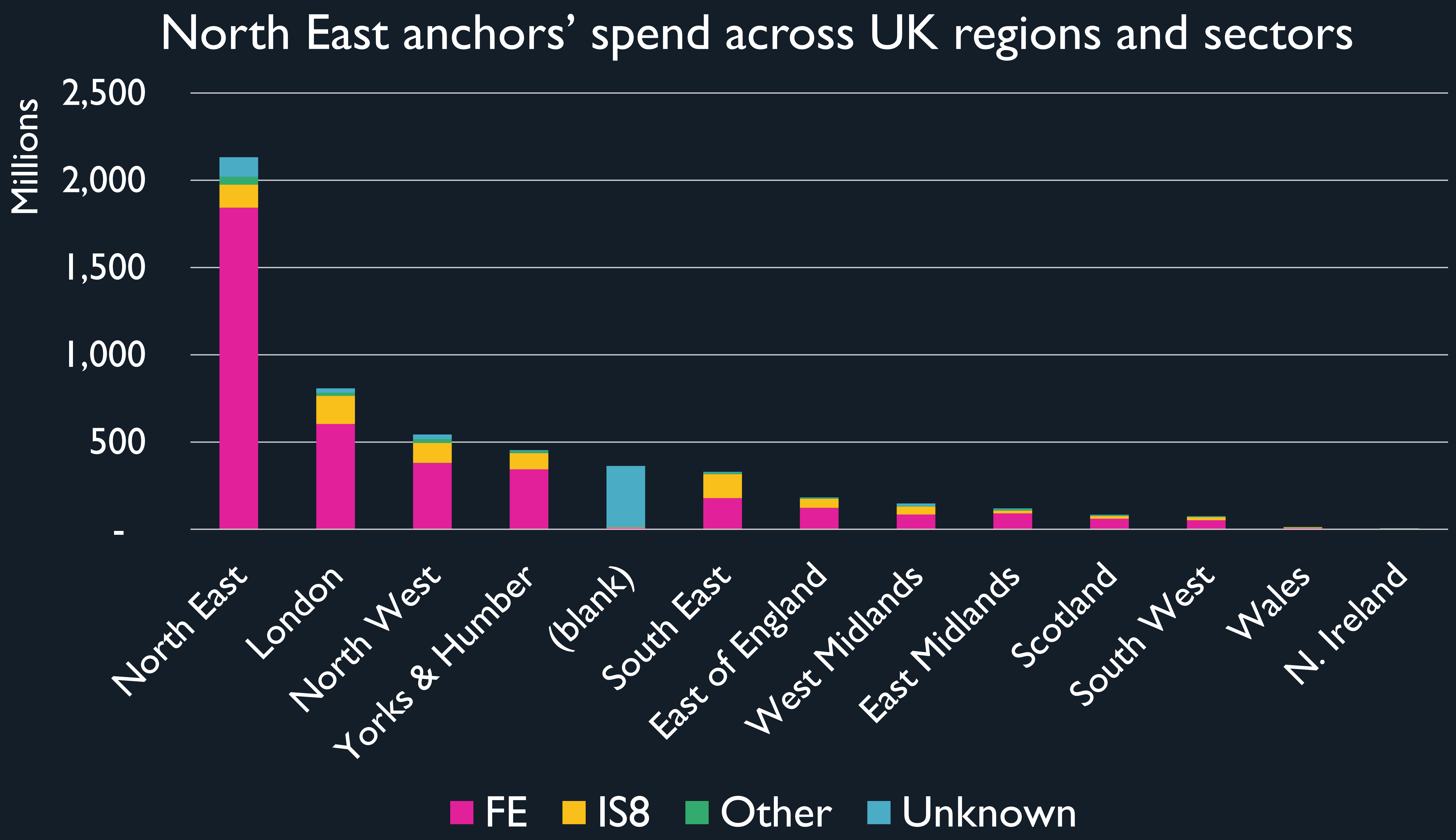
NB: Here services and public administration includes all public sector suppliers.

Anchor institutions spent over £2.1bn with North-East based suppliers, nearly 90% of which were in the foundational economy

The 13 North East anchors spent 41% of total spend, £2.13bn, with suppliers based in the North East region in 2024-25. Most of this (86%), equivalent to £1.8bn, was with suppliers in the foundational economy sectors.

By comparison, 15% of total spend was with London-based suppliers, of which 75% in FE sectors.

While this is a relatively high share of spend within the North East, there are likely to be further opportunities to spend more locally through collaborative effort on procurement by anchors.

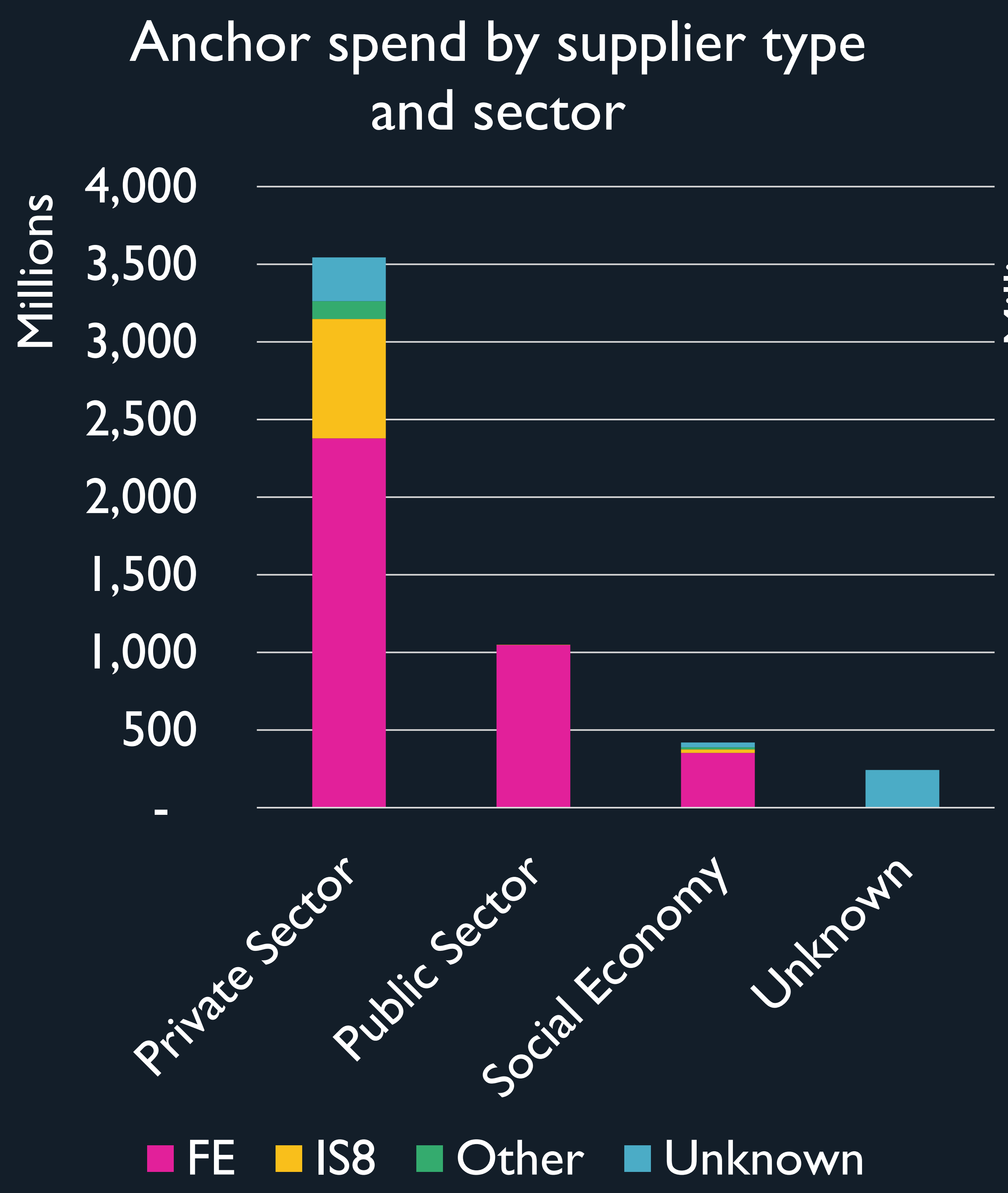


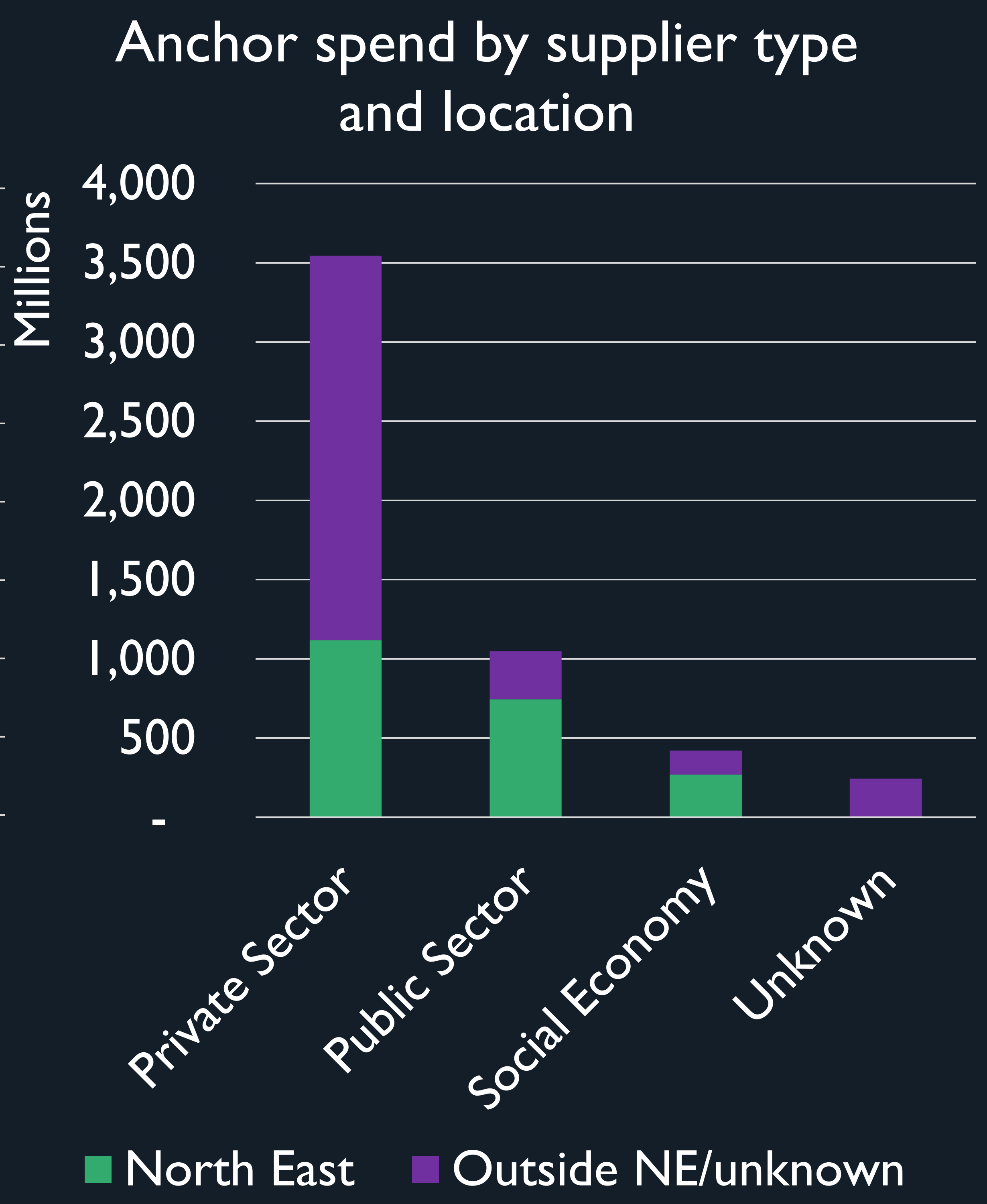
Anchor institutions spend only 8% with social economy organisations including VCSEs, compared to 67% with the private sector

The 13 North East anchors spent 67% of total spend, £3.5bn, with private sector organisations in 2024-25, of which £2.4bn with those in the foundational economy and £1.1 bn with those based in the North East.

20% of the total was spent with the public sector and 8% with social economy organisations.

The relatively low proportion of spend with social economy organisations suggests an opportunity to explore collaborative commissioning with the third sector, which can deliver higher quality services while reduction extraction (CLES: Public Money, Public Purpose).





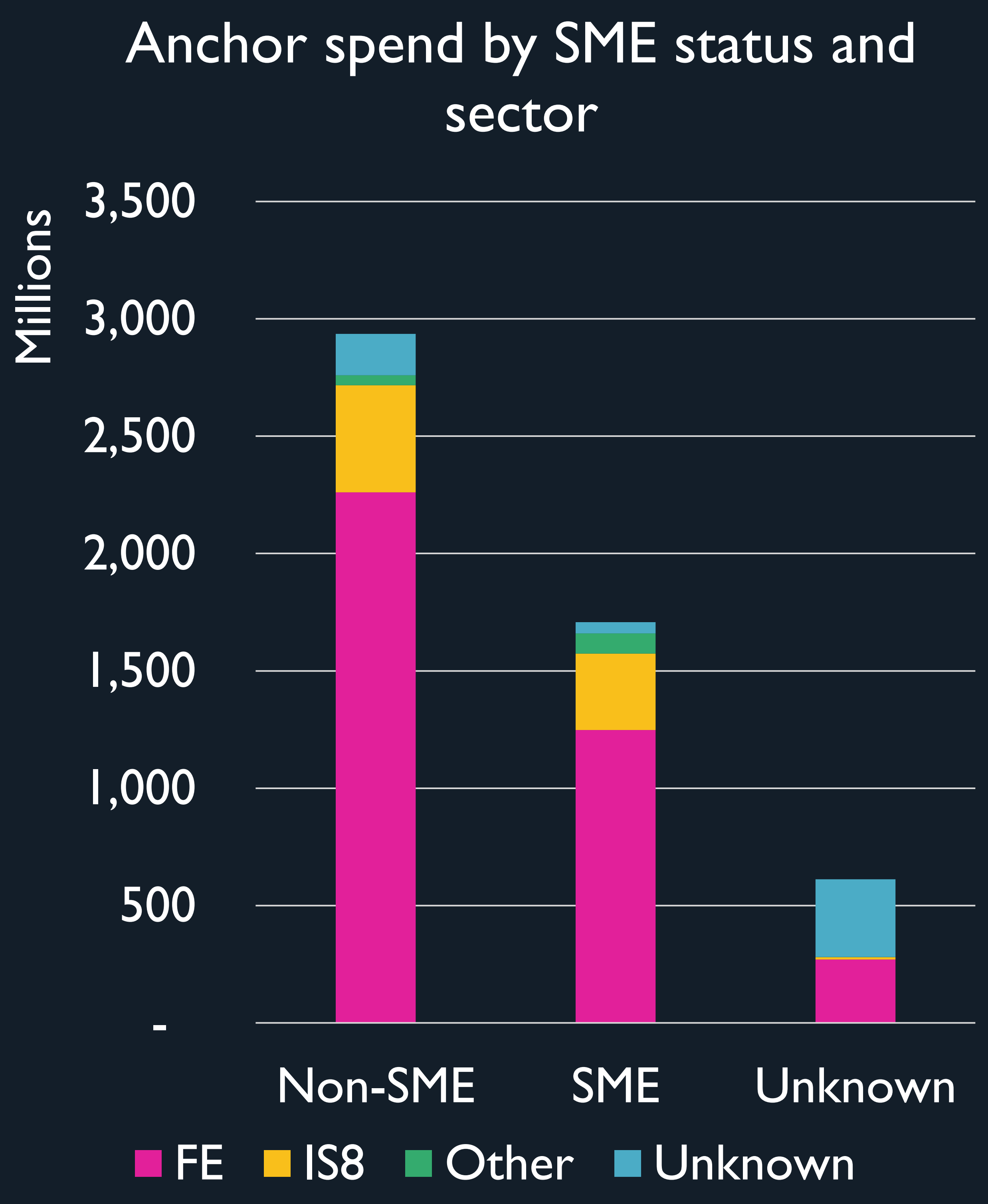
Anchor institutions spent £937 million with local SMEs, supporting local supply chains and employment

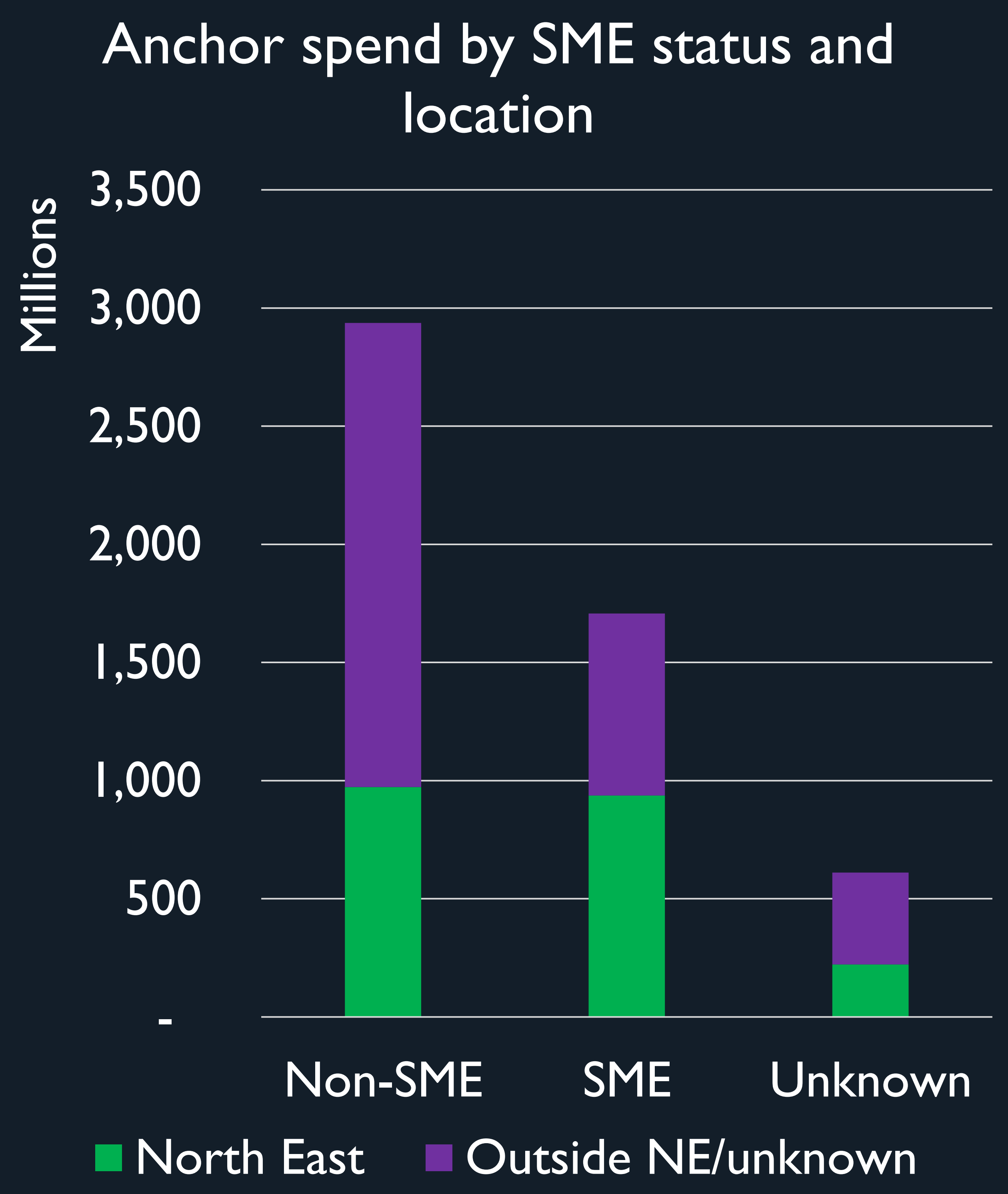
The 13 North East anchors spent a relatively high proportion of spend with SMEs, 32% of the total or £1.7bn.

Of this, £0.9bn (£937 million) was with local SMEs, representing an important contribution to local supply chains and employment.

Most spend with SMEs was in the foundational economy, at around £1.2bn.

Anchor institutions could work together to further increase spend with local SMEs and improve employment outcomes.





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Policy discussion: supporting the foundational economy

The foundational economy is vital for meeting community needs and underpins much of the wider economy. Policy should boost its resilience by supporting non-profit, community-responsive provision. Interventions could include:

- Subsector strategies for the Local Growth Plan: targeted action using CA/LA levers (skills, planning, business support), e.g. green skills for construction and retrofit.
- Grow the social economy: scale up Flexible Social Finance, learn from Greater Manchester's Foundational Economy Innovation Fund, and use Pride in Place funding to test alternative ownership/delivery models.
- Use mayoral powers (incl. MDCs) to deliver affordable social and community-led housing

Anchor institutions spend nearly £2bn a year in the region's foundational economy. The Combined Authority could help anchors work together to:

- Publish ongoing procurement spend data (collect, analyse, report).
- Open up procurement to local SMEs and VCSE organisations.
- Share supplier intelligence and market engagement to localise spend.
- Commission for less profit extraction and more public value, including not-for-profit provision.
- Raise supply-chain jobs quality: social value systems (e.g. SHINE (see approach in GMCA) and require Real Living Wages, as achieved in Newham and Wigan.

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Appendix – foundational economy sector definition

FE Sector	Deep Dive Sector (where applicable)	SIC Codes included [listed at 2 digit or 5 digit level]
Construction	Construction and Development	41: Construction of buildings 42: Civil Engineering
	Specialist Trades	43: Specialised construction activities
Education	N/A	85: Education
Health and Care	Health	86: Human health activities
	Care	87: Residential care activities 88: Social work activities
Housing and Accommodation	Other accommodation	55900: Other accommodation
	Housing	68: Real estate activities *[excluding 68202]*
Services and Recreation	N/A	75: Veterinary activities 91: Libraries, museums, cultural activities *[excluding 91012]* 93: Sports and recreation *[excluding 93191 and 93199]* 95: Repair of computers and personal goods *[excluding 95110 and 95120]* 96: Other personal service activities
Public Administration	N/A	84: Public administration and defence; compulsory social security

Appendix – foundational economy sector definition

FE Sector	**Deep Dive Sector (where applicable)**	**SIC** Codes included [listed at 2 digit or 5 digit level]
Retail	N/A	45 Wholesale and retail trade of motor vehicles 46 Wholesale trade *[excluding 5 digit sectors in Food category and 46510, 46520]* 47 Retail trade *[excluding 5 digit sectors in Food category]*
Tourism and Hospitality	Hotels and other accommodation	55: Accommodation *[excluding 55900]*
	Food and Drink	56: Food and beverage service activities
Transport	N/A	49: Land transport 50: Water transport 51: Air transport *[excluding 51102, 51210, 51220]* 52: Warehousing and support activities 53: Postal and courier activities
Utilities	N/A	35: Electricity, gas, steam and air-conditioning supply 36: Water collection, treatment and supply 37: Sewerage 38: Waste collection, treatment and disposal 39: Remediation activities and other waste services

Appendix – foundational economy sector definition

FE Sector	Deep Dive Sector (where applicable)	SIC Codes included [listed at 2 digit or 5 digit level]
Food Supply Chain	Food Production	01: Agriculture, hunting and related service activities *[excluding 01700]* 03: Fishing and aquaculture 10: Manufacture of food products 11: Manufacture of beverages
	Food Distribution	46210 : Wholesale of grain, unmanufactured tobacco, seeds and animal feeds, 46220 : Wholesale of flowers and plants, 46230 : Wholesale of live animals, 46240 : Wholesale of hides, skins and leather, 46310 : Wholesale of fruit and vegetables, 46320 : Wholesale of meat and meat products, 46330 : Wholesale of dairy products, eggs and edible oils and fats, 46341 : Wholesale of fruit and vegetable juices, mineral waters and soft drinks, 46342 : Wholesale of wine, beer, spirits and other alcoholic beverages, 46360 : Wholesale of sugar and chocolate and sugar confectionery, 46370 : Wholesale of coffee, tea, cocoa and spices, 46380 : Wholesale of other food, including fish, crustaceans and molluscs, 46390 : Non-specialised wholesale of food, beverages and tobacco, 47110 : Retail sale in non-specialised stores with food, beverages or tobacco predominating, 47210 : Retail sale of fruit and vegetables in specialised stores, 47220 : Retail sale of meat and meat products in specialised stores, 47230 : Retail sale of fish, crustaceans and molluscs in specialised stores, 47240 : Retail sale of bread, cakes, flour confectionery and sugar confectionery in specialised stores, 47250 : Retail sale of beverages in specialised stores, 47290 : Other retail sale of food in specialised stores, 47810 : Retail sale via stalls and markets of food, beverages and tobacco products