

Black Country Annual Economic Review 2025

January 2026



Our Measures of Success - The Black Country Performance Management Framework									
In the Black Country we will:	Where we are now		Change over the last year ¹		Direction of travel relative to national average since 2004		Scale of the challenge (To reach England where applicable)		
Grow our Population and Reverse Net Outward Migration Particularly to Environs	DUD	331,930	DUD	+3,577 (+1.1%)	DUD	+25,759 (+8.4%)			
	SAN	353,860	SAN	+4,026 (+1.2%)	SAN	+65,011 (+22.5%)			
	WAL	295,678	WAL	+4,441 (+1.5%)	WAL	+38,976 (+15.2%)			
	WOL	281,251	WOL	+5,650 (+2.1%)	WOL	+40,684 (+16.9%)			
	BC	1,262,719	BC	+17,694 (+1.4% BC) +1.2% Eng.	BC	+170,430 (+15.6% BC) +16.8% Eng.			
Raise Incomes	DUD	£35,486	DUD	+£700 (+2.0%)	DUD	+£16,295 (+84.9%)	DUD	+£3,727	
	SAN	£33,029	SAN	+£1,109 (+3.5%)	SAN	+£14,320 (+76.5%)	SAN	+£6,214	
	WAL	£34,036	WAL	+£1,538 (+4.7%)	WAL	+£15,358 (+82.2%)	WAL	+£5,207	
	WOL	£35,858	WOL	+£2,773 (+8.4%)	WOL	+£17,293 (+93.1%)	WOL	+£3,385	
	BC	£34,602 (avg.)	BC	+£1,530 (+4.6% BC) +4.3% Eng.	BC	+£15,817 (+84.2% BC) +74.9% Eng.	BC	+£4,641 Eng.: £39,243	
Achieve Better Population Balance	DUD	17.0%			DUD	-0.1pp	DUD	+16,257	
	SAN	10.8%			SAN	0pp	SAN	+36,179	
	WAL	13.7%			WAL	-0.5pp	WAL	+22,370	
	WOL	13.4%			WOL	-0.3pp	WOL	+21,620	
	BC	13.6%			BC	-0.3pp BC +0.5pp Eng.	BC	+96,427 Eng.: 23.5% AB's	
Transform the Environment	70.5% of residents satisfied with Black Country as a place to live						77.8% resident satisfaction		
Regenerated Our Economy (pp = percentage points)									
Reduce the Output Gap	DUD	£5.8bn	DUD	+£664m	DUD	+£3.5bn	DUD	-£5.8bn	
	SAN	£5.4bn	SAN	+£463m	SAN	+£3.9bn	SAN	-£5.4bn	
	WAL	£5.1bn	WAL	+£441m	WAL	+£3.1bn	WAL	-£5.1bn	
	WOL	£3.5bn	WOL	+£435m	WOL	+£2.4bn	WOL	-£3.5bn	
	BC	£19.8bn	BC	+£2.0bn	BC	+£12.9bn	BC	-£19.8bn	
Raise the Number of Local Jobs	DUD	106,000	DUD	-5,000 (-4.5%)	DUD	-12,000 (-10.2%)			
	SAN	125,000	SAN	-2,000 (-1.6%)	SAN	+2,000 (+1.6%)			
	WAL	98,000	WAL	-1,000 (-1.0%)	WAL	+4,000 (+4.3%)			
	WOL	111,000	WOL	+1,000 (+0.9%)	WOL	+7,000 (+6.7%)			
	BC	440,000	BC	-7,000 (-1.6% BC) +0.6% Eng.	BC	+1,000 (+0.2% BC) +19.8% Eng.			
Increase the Total Employment Rate	DUD	75.1%	DUD	-1.6pp	DUD	+2.1pp	DUD	+1,296	
	SAN	65.7%	SAN	-1.9pp	SAN	+1.3pp	SAN	+20,953	
	WAL	71.8%	WAL	-3.2pp	WAL	+3.4pp	WAL	+6,875	
	WOL	75.1%	WOL	+10.5pp	WOL	+6.3pp	WOL	+1,036	
	BC	71.7%	BC	+0.6pp BC +0.2pp Eng.	BC	+3.0pp BC +2.9pp Eng.	BC	+30,083 Eng.: 75.8%	
Increase the Percentage of Knowledge Workers	DUD	46.4%	DUD	+2.0pp	DUD		DUD	+10,891	
	SAN	37.0%	SAN	+5.5pp	SAN		SAN	+23,736	
	WAL	43.5%	WAL	+8.4pp	WAL		WAL	+13,589	
	WOL	51.6%	WOL	-3.1pp	WOL		WOL	+2,725	
	BC	44.5%	BC	+3.8pp BC +0.6pp Eng.	BC		BC	+51,149 Eng.: 53.8%	
Raise Enterprise Births	DUD	1,175	DUD	+30 (+2.6%)	DUD	-15 (-1.3%)	DUD	+426 P.A.	
	SAN	1,655	SAN	+115 (+7.5%)	SAN	+715 (+76.1%)	SAN	+51 P.A.	
	WAL	1,280	WAL	-30 (-2.3%)	WAL	+235 (+22.5%)	WAL	+146 P.A.	
	WOL	1,385	WOL	+85 (+6.5%)	WOL	+385 (+38.5%)	WOL	Above National	
	BC	5,495	BC	+200 (+3.8%) +0.3% Eng.	BC	+1,320 (+31.6% BC) +13.8% Eng.	BC	+594 P.A. Eng.: 48 per 10,000 pop.	
Reduce the Percentage of Workless Households	DUD	9.6%	DUD	-4,300 (-31.9%)	DUD	-6,500 (-41.4%)	DUD	Below England	
	SAN	18.6%	SAN	0 (0%)	SAN	-400 (-2.1%)	SAN	-5,317	
	WAL	10.6%	WAL	-6,300 (-42.3%)	WAL	-7,200 (-45.6%)	WAL	Below England	
	WOL	18.1%	WOL	+1,100 (+8.0%)	WOL	-300 (-2.0%)	WOL	-3,827	
	BC	14.3%	BC	-9,500 (-15.5%) +0.9% Eng.	BC	-14,500 (-21.9%) BC -14.6% Eng.	BC	-2,948 Eng.: 13.5%	
Increase the Number of Visitors to the Area	35.05m		+1.39m				A leading UK visitor destination		

In the Black Country we will:	Where we are now		Change over the last year ¹		Direction of travel relative to national average since 2004		Scale of the challenge (To reach England where applicable)	
Sustainable Environmental Transformation								
Increase the Hectares of Local Nature Reserves	887.3ha		0ha		-		1ha of Local Nature Reserve per 1,000 pop.	
Have a Sustainable Environment- Reduce CO ₂ Emissions (Tonnes per capita)	DUD	2.9	DUD	-0.2	DUD	-3.3	Net Zero by 2041	
	SAN	3.3	SAN	-0.3	SAN	-4.4		
	WAL	3.1	WAL	-0.2	WAL	-3.8		
	WOL	2.9	WOL	-0.2	WOL	-3.9		
	BC	3.1	BC	-0.2 BC -0.3 Eng.	BC	-3.9 BC -4.6 Eng.		
Raised Education and Skills								
Reduce the Number of People with No Qualifications	DUD	7.4%	DUD	+5,400 (+62.8%)	DUD	-13,700 (-49.5%)	DUD	-1,529
	SAN	14.9%	SAN	+6,400 (+26.3%)	SAN	-9,500 (-23.6%)	SAN	-17,110
	WAL	11.8%	WAL	+300 (+1.6%)	WAL	-12,400 (-39.1%)	WAL	-8,568
	WOL	9.8%	WOL	-3,600 (-19.6%)	WOL	-19,900 (-57.3%)	WOL	-4,858
	BC	11.1%	BC	+8,400 (-0.7% BC) +6.8% Eng.	BC	-55,700 (-41.4% BC) -51.2% Eng.	BC	-31,965 Eng.: 6.6%
Increase the Number of People with RQF4+	DUD	38.9%	DUD	-2,400 (-3.2%)	DUD	+34,700 (+89.0%)	DUD	+14,882
	SAN	29.7%	SAN	-2,900 (-4.5%)	SAN	+34,200 (+125.7%)	SAN	+35,133
	WAL	28.4%	WAL	-8,000 (-14.7%)	WAL	+18,400 (+65.9%)	WAL	+29,935
	WOL	45.7%	WOL	+4,800 (+7.5%)	WOL	+44,300 (+178.6%)	WOL	+1,522
	BC	35.3%	BC	-8,500 (-3.3% BC) +0.5% Eng.	BC	+131,700 (+110.9% BC) +100.1% Eng.	BC	+81,471 Eng.: 46.8%
Improve Pupils Progress 8 Score	DUD	-0.12	DUD	-0.11	DUD		DUD	Improve by 0.09
	SAN	-0.16	SAN	-0.09	SAN		SAN	Improve by 0.13
	WAL	-0.22	WAL	-0.02	WAL		WAL	Improve by 0.19
	WOL	-0.05	WOL	-0.03	WOL		WOL	Improve by 0.02
	BC	-0.14	BC	-0.04	BC		BC	Improve by 0.11 Eng.: -0.03
Reduce the No. of 16–17-Year- Olds Not in Education, Employment or Training (NEET)	DUD	21.5%	DUD	+833 (+101.3%)	DUD		DUD	-1,655
	SAN	2.6%	SAN	-1 (-0.4%)	SAN		SAN	-261
	WAL	5.2%	WAL	+15 (+3.6%)	WAL		WAL	-427
	WOL	3.9 %	WOL	+28 (+11.1%)	WOL		WOL	-281
	BC	7.8%	BC	+875 (+50.0% BC) +8.7% Eng.	BC		BC	No NEETs -2,624
Transformed our Environmental Infrastructure								
Increase Net New Homes	DUD	142,236	DUD	+686 (+0.5%)	DUD	+13,110 (+10.2%)	DUD	
	SAN	137,002	SAN	+596 (+0.4%)	SAN	+16,595 (+13.8%)	SAN	
	WAL	119,232	WAL	+651 (+0.5%)	WAL	+12,741 (+12.0%)	WAL	
	WOL	115,585	WOL	+421 (+0.4%)	WOL	+13,739 (+13.5%)	WOL	
	BC	514,055	BC	+2,354 (+0.5% BC) +0.8% Eng.	BC	+56,186 (+12.3% BC) +19.1% Eng.	BC	
Provide Industrial Floorspace	DUD	2,371,000 sqm	DUD	+15,000 sqm	DUD	-590,000 sqm	DUD	
	SAN	3,908,000 sqm	SAN	-2,000 sqm	SAN	-915,000 sqm	SAN	
	WAL	2,201,000 sqm	WAL	+25,000 sqm	WAL	-596,000 sqm	WAL	
	WOL	2,194,000 sqm	WOL	+9,000 sqm	WOL	-574,000 sqm	WOL	
	BC	10,674,000 sqm	BC	+47,000 sqm	BC	-2,675,000 sqm	BC	
Provide Office Floorspace	DUD	258,000 sqm	DUD	-1,000 sqm	DUD	-48,000 sqm	DUD	
	SAN	180,000 sqm	SAN	-2,000 sqm	SAN	-16,000 sqm	SAN	
	WAL	166,000 sqm	WAL	-4,000 sqm	WAL	-7,000 sqm	WAL	
	WOL	211,000 sqm	WOL	+1,000 sqm	WOL	-32,000 sqm	WOL	
	BC	815,000 sqm	BC	-6,000 sqm	BC	-103,000 sqm	BC	
Provide Retail Floorspace	DUD	598,000 sqm	DUD	-5,000 sqm	DUD	-20,000 sqm	DUD	
	SAN	564,000 sqm	SAN	-3,000 sqm	SAN	+71,000 sqm	SAN	
	WAL	507,000 sqm	WAL	-4,000 sqm	WAL	+39,000 sqm	WAL	
	WOL	501,000 sqm	WOL	-6,000 sqm	WOL	-28,000 sqm	WOL	
	BC	2,170,000 sqm	BC	-18,0000 sqm	BC	+62,000 sqm	BC	

¹ The **green** shading illustrates those indicators where the Black Country moved in a positive direction of travel compared to the national average, the **red** shading indicates the reverse and the **orange** indicates no change or a growth rate in the right direction but less than the national average growth rate. Please note for qualifications, RQF's have replaced NVQs, and caution should be used when comparing change over time. West Midlands Growth Company (WMGC) provided the visitor economy figure for the Black Country via the STEAM model.

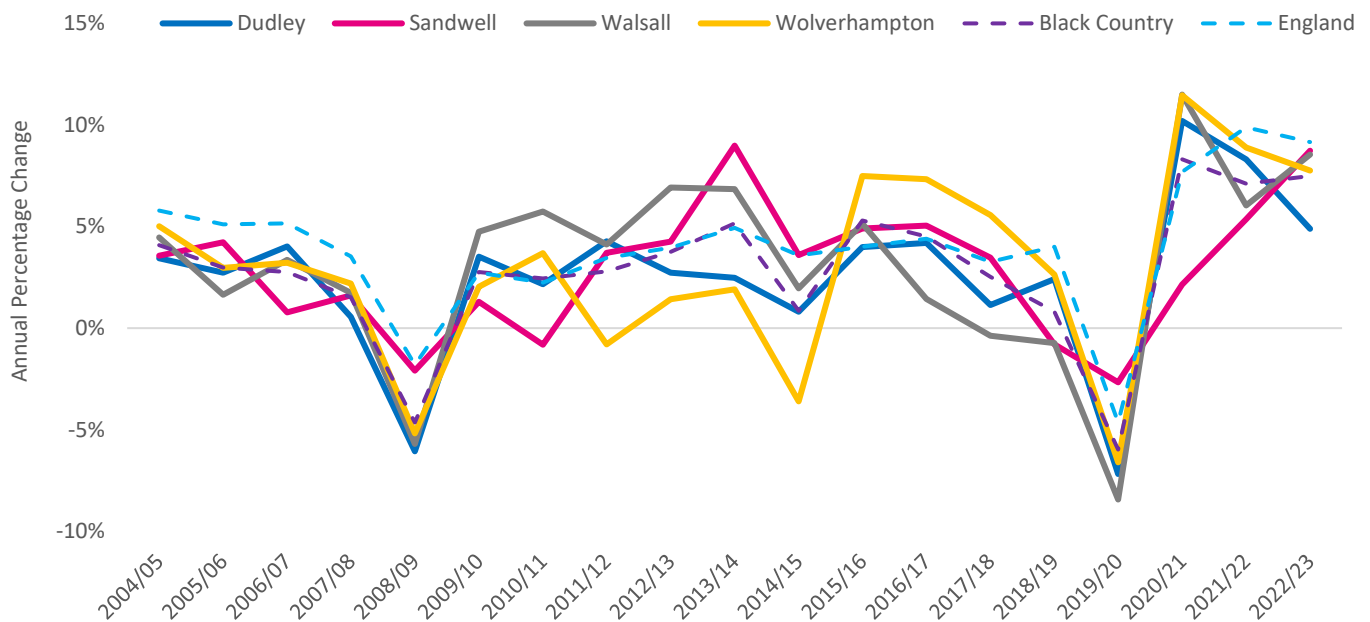
2025 KEY MESSAGES

1.1. Economy

Productivity Challenge

- After three years of consecutive growth, Gross Value Added (GVA) in the Black Country² stood at £25.4bn in 2023. However, the growth rate consistently lags behind the national average, with the latest annual change at 7.5% for the Black Country compared to 9.1% for England. **GVA increased across all four local authorities** but at a slower rate than nationally with Dudley increasing by 4.9% (to nearly £6.2bn), Wolverhampton by 7.7% (to £6.4bn), Walsall by 8.5% (to £5.5bn) and Sandwell by 8.7% (to £7.3bn).
- Insights for 2025 show that the **UK economy continues to expand**, but the pace of growth **remains modest and vulnerable** to disruption. Inflationary pressures persist, limiting real income gains and constraining consumer demand. Although **business investment shows signs of improvement**, rising cost burdens and an uncertain global environment are tempering overall economic momentum.

Annual Changes in Total GVA:



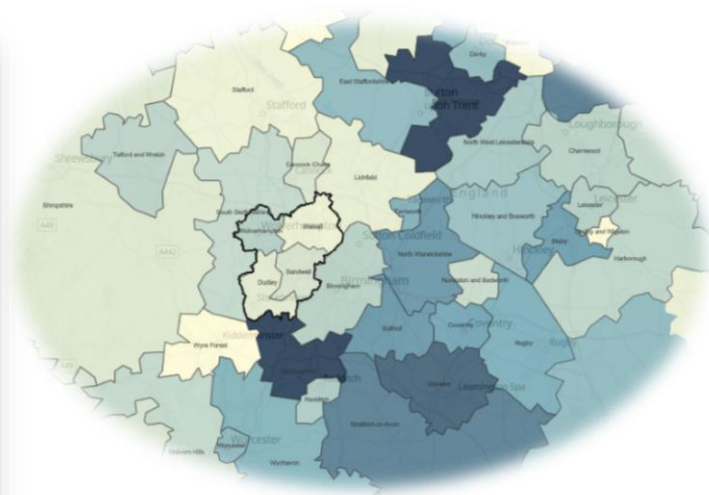
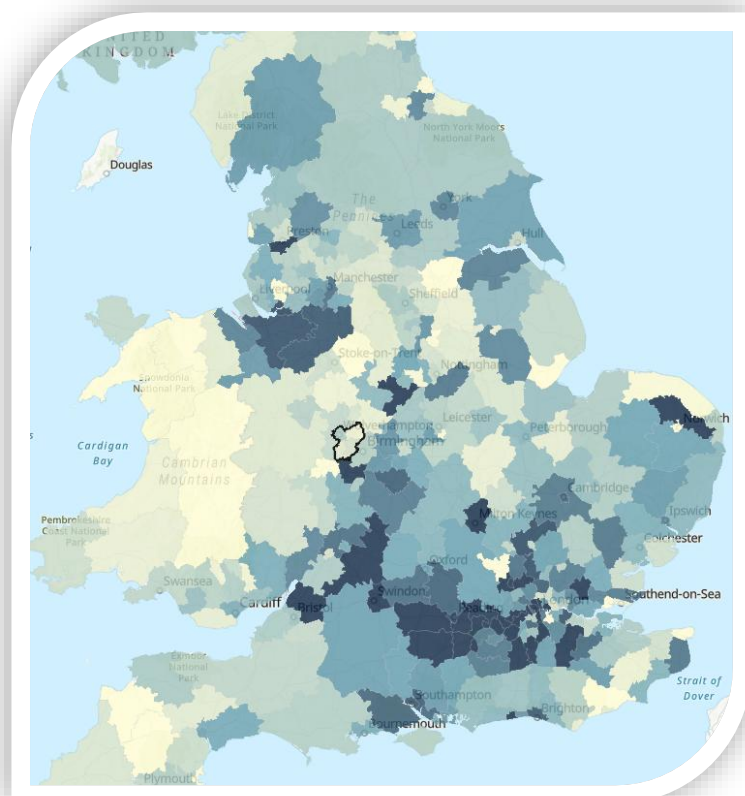
- The **Black Country's GVA per head remains substantially lower than the national average at £20,565 compared to £36,632**. Despite an annual increase in GVA per head, all four local authorities fall below the national average, with Walsall at £19,069, Dudley at £18,838, Sandwell at £21,021 and Wolverhampton at £23,640. This means that the Black Country local authority areas have a **shared challenge related to the overall output gap³ of local economies, collectively totalling £19.8bn in 2023, an annual increase of £2.0bn and longer-term (since 2004) a significant increase of just over £12.9bn**.

² Office for National Statistics (ONS), Regional economic activity by gross domestic product, released 2025. Please note figures are in current prices.

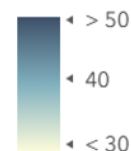
³ The EIU calculations based off ONS, Regional economic activity by gross domestic product, released 2025 and mid-year population estimates, released 2025.

- **Productivity⁴ (measured as GVA per hour) increased annually across all four local authorities but at a slower rate than nationally, meanings gaps to the national average (£41.90) persist.** Walsall increased by 0.6% (to £31.20), Sandwell by 1.0% (to £32.80), Dudley by 1.3% (to £31.90) and Wolverhampton by 2.0% (to £35.30).
- The gap to the national average varies from £6.60 in Wolverhampton and £9.10 in Sandwell to £10.00 for Dudley and £10.70 in Walsall.

GVA per Hour Worked, 2023:



GVA per hour worked (£)



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- The Black Country's **lagging economic performance is likely contributing to lower prosperity, reduced living standards and higher levels of deprivation.** Gross Disposable Household Income (GDHI) per head⁵, which reflects economic well-being for the household sector, highlights this disparity. In 2023, GDHI per person was £18,008 in the Black Country compared to £24,836 for the UK.
- Across all local (361) areas, Sandwell was second lowest for GDHI per head at £16,562 (the same position as in 2021 and 2022). Wolverhampton was 14th lowest at £18,174 (moving down from 19th place in 2022), Walsall was 17th lowest at £18,199 (moving up from 15th in 2022) and Dudley was 37th lowest at £19,238 (moving up from 35th place in 2022).

⁴ ONS, Subregional productivity in the UK, released 2025

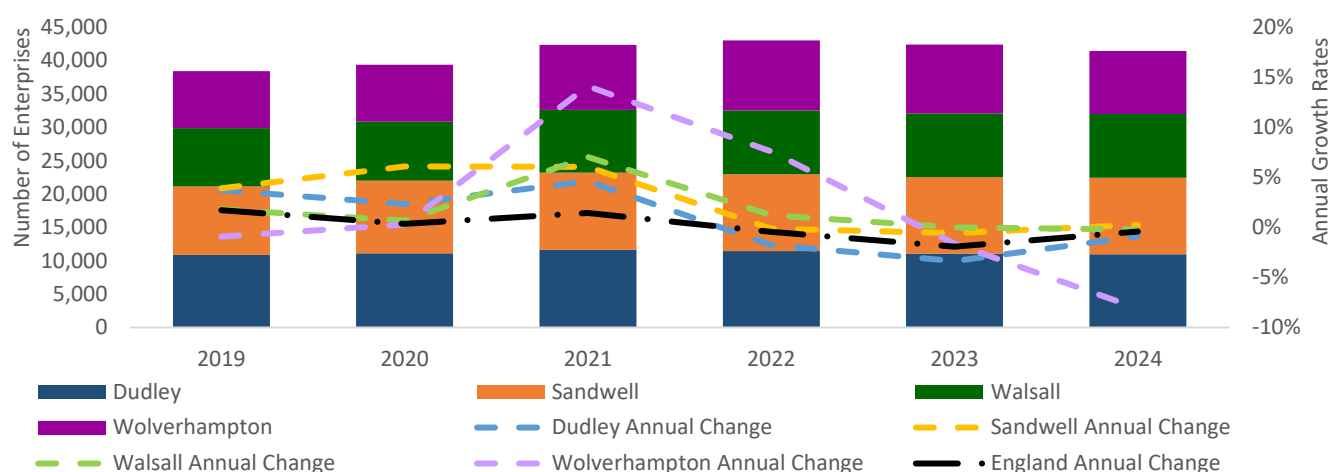
⁵ ONS, Regional gross disposable household income, released 2025

1.2. Business

Struggling Business Environment

- For the second consecutive year (third consecutive year nationally), there has been a decline in enterprises. In 2024, there were **41,470 enterprises⁶** in the Black Country, **an annual decrease of 2.2% (-925 enterprises), above the national decline of 0.4%**. Sandwell bucked the trend by increasing by 0.3%, but declines were recorded in Walsall (-0.2%), Dudley (-0.9%) and Wolverhampton (-8.1%). Despite the recent declines, **enterprises in the Black Country have increased by 8.0% when compared to 2019, which contrasts with the national trend of a decrease by 1.0%**.
- Overall, there are still **too few enterprises** in the Black Country. There were **328 enterprises per 10,000 population for the Black Country area compared to 430 per 10,000 population for England** in 2024. For the Black Country to reach the national average, it requires **an additional 12,841 active enterprises**. This is a **challenge across all four local authorities**, with the number of active enterprises per 10,000 population varying slightly from 322 in Walsall and 325 in Sandwell, to 330 in Dudley and 337 in Wolverhampton.

Trends in Active Enterprises:



- In 2024, there were **155 high-growth firms** in the Black Country. This represents an **annual increase of 3.3% (+5)**, just behind the national average of 4.0%. There was a mixed picture within the Black Country as Dudley and Wolverhampton both increased by 5 (to 45 and 35 respectively), while Sandwell remained unchanged at 50 and Walsall decreased by 5 (to 25).
- Overall Black Country enterprise survival rates remain lower than national levels on both a short-term and long-term basis.** Of the 5,295 enterprise births in 2023, there were 92.3% still active after 1 year with England at 93.4%. Of the 5,285 enterprise births in 2019 in the Black Country area, 35.8% were still active after 5 years with England at 38.3%.
- Following two years of declines, **enterprise births increased in the latest annual change.** In 2024, there were 5,495 enterprise births in the Black Country, an increase of 3.8% (+200), notably above the England-wide increase of 0.3%. **Growth was experienced in three of the Black Country local authorities:** Dudley by 2.6%, Wolverhampton by 6.5% and Sandwell by 7.5%. Walsall experienced a small decline by 2.3%.

⁶ ONS, Business Demography, released 2025

- There were **44 enterprise births per 10,000 population for the Black Country area compared to 48 per 10,000 population for England** in 2024. To match the national average, the Black Country requires an overall increase of 594 births per year. The number of enterprise births per 10,000 population varied from 35 in Dudley, 43 in Walsall, 47 in Sandwell and 49 in Wolverhampton.
- Experimental quarterly data⁷ shows an overall positive picture locally and nationally as **business births were back above business deaths in Q3 2025**.
- There is an opportunity across the Black Country to **harness innovative activity of the diverse business base locally**, including **female-led businesses, ethnic-minority owned businesses (EMBs) and voluntary and social enterprises (VCSEs)**. 19.1% of companies in the Black Country are female-led⁸, slightly below the UK average (19.2%). Proportions varied from 17.3% in Sandwell, 17.7% in Walsall, 20.4% in Dudley and 21.2% in Wolverhampton.

Traditional Sectors

- Out of 9 defined sectors, as seen in the table below, the Black Country has **higher than the national proportion in 6 sectors for GVA⁹, 4 sectors in jobs¹⁰ and 5 sectors for enterprises¹¹** (as illustrated by the green shading in the following table).

GVA, Jobs and Enterprises per Sector:

	Black Country GVA	% of Black Country GVA	% of England GVA	Black Country Jobs	% of Black Country Jobs	% of England Jobs	Black Country Enterprises	% of Black Country Enterprises	% of England Enterprises
Advanced Manufacturing	£4.6bn	18.0%	10.7%	57,760	13.2%	9.5%	3,970	10.8%	11.4%
Building Technologies	£2.2bn	8.6%	6.3%	19,900	4.5%	4.9%	5,455	14.9%	14.1%
Business Services	£6.6bn	26.1%	43.0%	69,830	16.0%	26.1%	9,950	27.1%	37.6%
Environmental Technologies	£543m	2.1%	2.4%	4,485	1.0%	1.1%	235	0.6%	0.5%
Health & Wellbeing	£3.0bn	11.8%	8.2%	78,100	17.8%	14.0%	1,940	5.3%	4.4%
Public Sector inc. Education	£3.1bn	12.4%	11.6%	64,500	14.7%	15.5%	1,065	2.9%	4.1%
Retail	£3.1bn	12.2%	10.1%	79,000	18.1%	13.7%	7,620	20.8%	14.5%
Transport Technologies	£1.4bn	5.5%	3.5%	31,780	7.3%	5.1%	3,555	9.7%	4.2%
Visitor Economy	£835m	3.3%	4.3%	32,285	7.4%	10.1%	2,870	7.8%	9.0%
Total	£25.4bn	100%	100.0%	440,000	100%	100%	36,660	100%	100%

- Additional visitor economy analysis from the STEAM model¹² shows that in 2024 there were **35.05m visitors** to the Black Country which provided an **economic impact of £1.86bn** and **supported 17,587 full-time equivalent jobs**.

⁷ ONS, Business demography, quarterly experimental statistics, low-level geographic breakdown, released 2025

⁸ The Gender Index, 2025

⁹ ONS, Regional economic activity by gross domestic product, released 2025

¹⁰ ONS, Business Register and Employment Survey, released 2025. Please note, figures are based off employees.

¹¹ ONS, UK Business Counts, released 2025

¹² WMGC, STEAM model

- Furthermore, **450 strategic companies¹³** have been identified in the Black Country area, split by 93 in Wolverhampton, 97 in Walsall, 123 in Dudley and 137 in Sandwell.

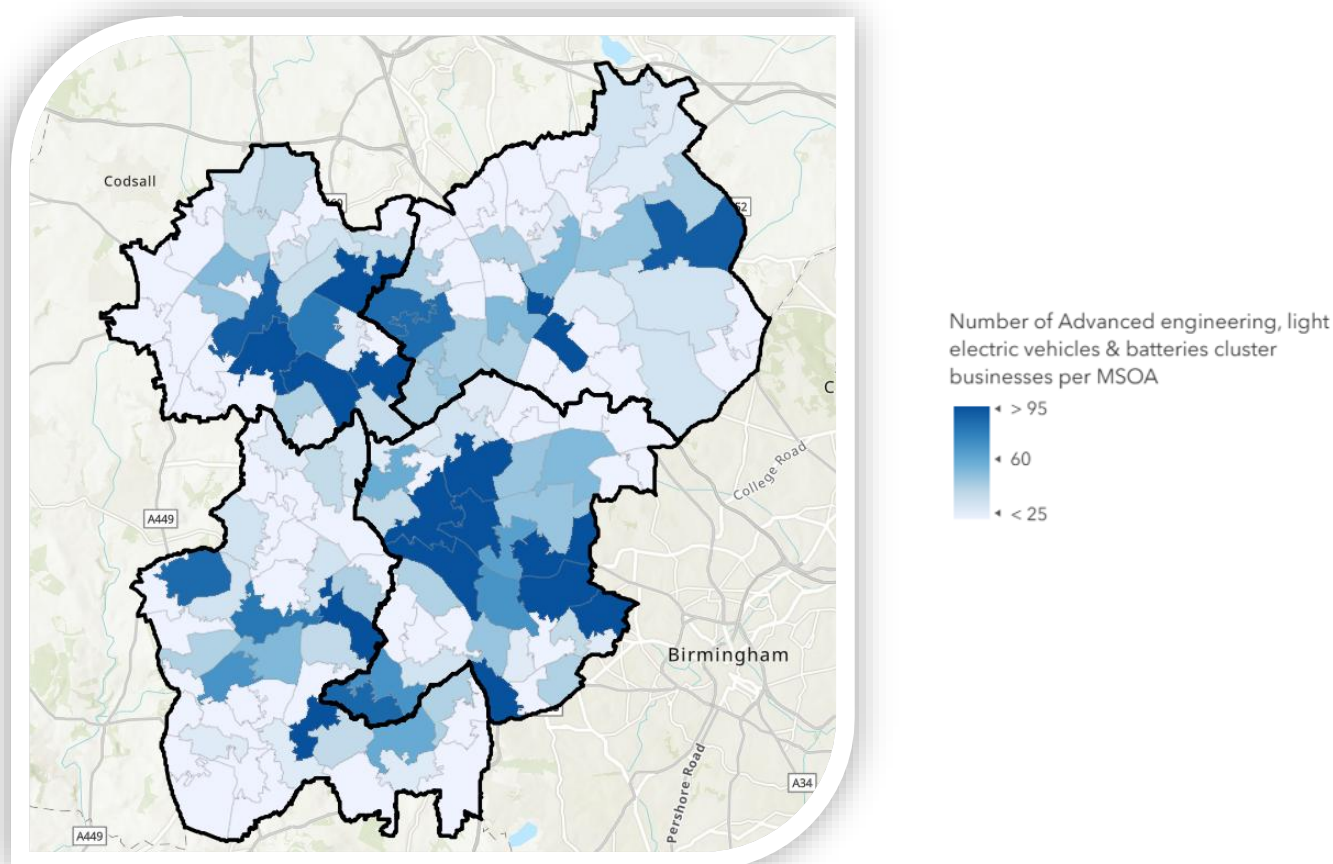
West Midlands High Growth Clusters

- When aligning to the five high growth clusters¹⁴ as seen in the [West Midlands Growth Plan](#), the **Black Country accounts for approximately nearly 50% of the WMCA total businesses in advanced engineering, light electric vehicles & batteries and smart energy systems**. As well as over 40% of GVA in smart energy systems and of employment and GVA in advanced engineering, light electric vehicles & batteries. **In the advanced engineering, light electric vehicles & batteries cluster, the Black Country has key strengths in aerospace, industrial and logistics & distribution.**

Black Country GVA, Employment and Businesses per High Growth Cluster:

	Black Country GVA	% of WMCA GVA	Black Country Employment	% of WMCA Employment	Black Country Businesses	% of WMCA Businesses
Advanced Engineering, Light Electric Vehicles & Batteries	£5.3bn	42.7%	81,983	43.5%	8,334	50.3%
Digital Tech & Creative	£467m	15.1%	4,860	14.0%	1,390	29.2%
Health & Med Tech	£60m	14.7%	870	17.2%	140	38.4%
Next Generation Services	£4.4bn	22.0%	33,250	20.4%	5,625	30.3%
Smart Energy Systems	£555m	40.5%	6,640	32.1%	1,525	45.3%

Businesses in the Advanced Engineering, Light Electric Vehicles & Batteries Cluster:



¹³ The EIU analysis from The Data City, 2025.

¹⁴ Please note, these clusters do not cover all businesses/employment or GVA.

The Industrial Strategy (IS)-8 Sectors

- The UK Government has launched [The Modern Industrial Strategy](#) which identifies **eight growth-driving sectors**. These sectors are advanced manufacturing, clean energy industries, creative industries, defence, digital & technologies, financial services, life sciences, and professional & business services. Data shows¹⁵ that the Black Country has either **the same or a higher proportion than nationally in 4 sectors for enterprises and 3 sectors for jobs** as illustrated by the green shading in the following table.

Employees and Businesses per IS-8 Sector:

	Employees			Businesses		
	Black Country	Black % of Total	UK % of Total	Black Country	Black Country % of Total	UK % of Total
Advanced Manufacturing	13,870	3%	2%	520	1%	1%
Clean Energy Industries	5,457	1%	3%	244	1%	1%
Creative Industries	6,205	1%	5%	1,675	5%	10%
Defence	2,449	1%	0.1%	22	0.1%	0.1%
Digital & Technologies	5,565	1%	7%	2,130	6%	10%
Financial Services	7,750	2%	3%	530	1%	2%
Life Sciences	320	0.1%	0.1%	40	0.1%	0.1%
Professional & Business Services	40,010	9%	14%	5,630	15%	21%
Total	81,626	18.1%	34.2%	10,791	30.2%	45.2%

- A Location Quotient (LQ) is a measure that compares the concentration of an industry, sector, or occupation in a specific region to its concentration at a broader geographic level (in this case, the national average). **Advanced manufacturing shows concentration in the Black Country with a business LQ of 1.49, employee LQ of 1.36, and turnover LQ of 1.74, making it a key specialism.**

Black Country Location Quotient per IS-8 Sector:

Sector	Business LQ	Employee LQ	Turnover LQ
Advanced Manufacturing	1.49	1.36	1.74
Clean Energy Industries	0.66	0.83	0.63
Creative Industries	0.71	0.54	0.47
Defence	0.39	1.02	1.59
Digital and Technologies	0.47	0.32	0.52
Financial Services	0.64	0.41	0.34
Life Sciences	0.77	0.75	0.5
Professional and Business Services	0.69	0.69	0.76

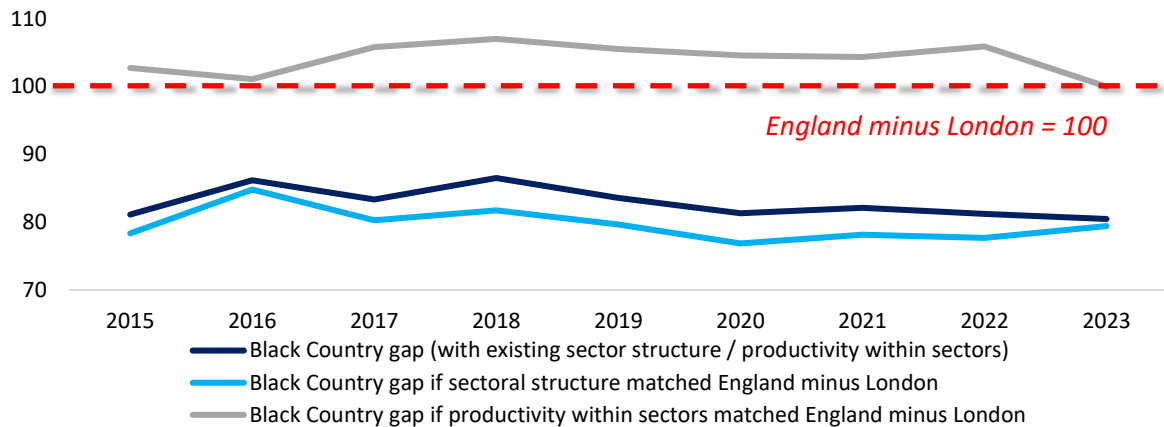
In-Sector Productivity

- Analysis of sectoral composition shows that productivity differences are not necessarily due to sectoral mix, but rather to **firm-level performance within sectors**. Analysis decomposes the productivity gap into two components - **sectoral composition**: the types of industries present in the region and **within-sector performance**: productivity achieved by firms within those industries. If the Black Country were to adopt the **same employment structure as England (minus London)**, productivity would worsen, suggesting the region does not suffer from the “wrong” sector mix.

¹⁵ The EIU analysis from The Data City, 2025.

- Aligning productivity within each sector to national levels closes the gap and even surpasses the benchmark. **The Black Country's productivity challenge lies in within-sector performance — factors like firm composition, tasks, market access, value-chain positioning, and innovation.** It is not the sectors themselves, but what firms do within them that drives productivity.

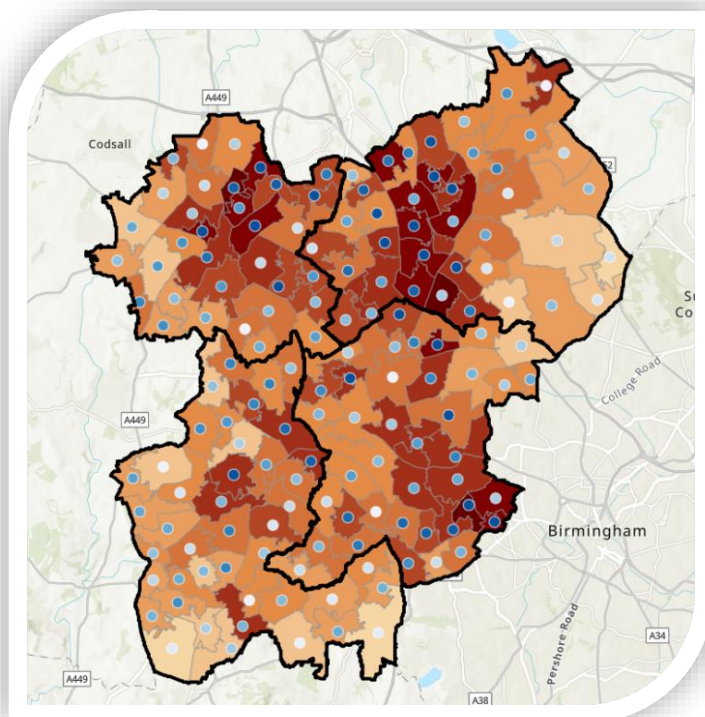
Contribution of Sectoral Composition and Productivity within Sectors to the Black Country Productivity Gap:



Everyday Economy

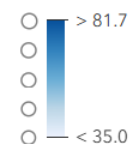
- As defined in the [West Midlands Growth Plan](#), the everyday economy consists of jobs in sectors such as health, retail, education, hospitality, transport, and utilities. These are seen as essential services that are the backbone of the economy. **Across the Black Country, it is estimated that 64.0% of residents work in these jobs while 63.8% of workplace jobs are in these jobs¹⁶.**

Workplace and Resident Jobs in Everyday Economy:



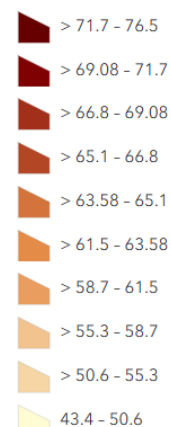
Share of Workplace Jobs in Everyday Economy (%)

EE_Workplace_Jobs_%



Share of Resident Jobs in Everyday Economy (%)

EE_Resident_Jobs_%



¹⁶ Census 2021

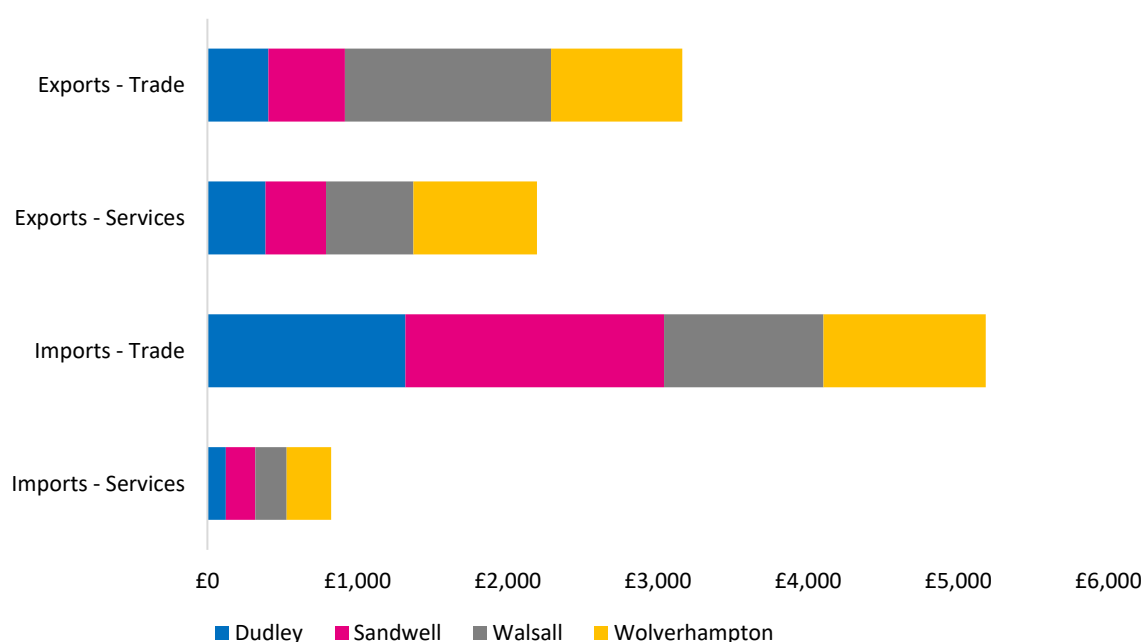
Shortfalls in Innovation Funding

- The 2024/25 competition year for **Innovate UK awards¹⁷ in the Black Country** totalled **£3.1m**, this is **lower than the level of funding secured in 2023/24** (£4.8m) and significantly below the highest level of funding ever recorded in the Black Country, which was £11.3m in the 2022/23 competition year.
- Following on from the 2020-21 UKRI reported figures where findings included Black Country spending was £6 per head compared to £107 nationally and for Innovate UK it was £3 per head compared to £23. As per 'sizing up the prize', the Black Country has a significant gap in Innovate UK awards as compared to the UK, where **per head the Black Country has a £316m gap in Innovate UK Awards received and per business, the Black Country has a £216m gap in Innovate UK Awards received.**

Resilient International Trade

- Export demand¹⁸ has been resilient across the Black Country in recent years **despite challenging trading conditions**, with **exports from the Black Country area increasing from £5.14bn in 2022 to £5.36bn in 2023**, a 4.3% rise. Imports to the Black Country area decreased from £6.11bn in 2022 to £6.01bn in 2023, a small reduction of 1.6%.
- **International trade activity** across the Black Country is overwhelmingly **driven by goods rather than services**. All four local authorities import and export significantly higher values of traded goods compared with service-based activity, **reflecting the area's strong manufacturing and supply-chain orientation.**

International Trade Activity, 2023:



¹⁷ Innovate UK, 2025

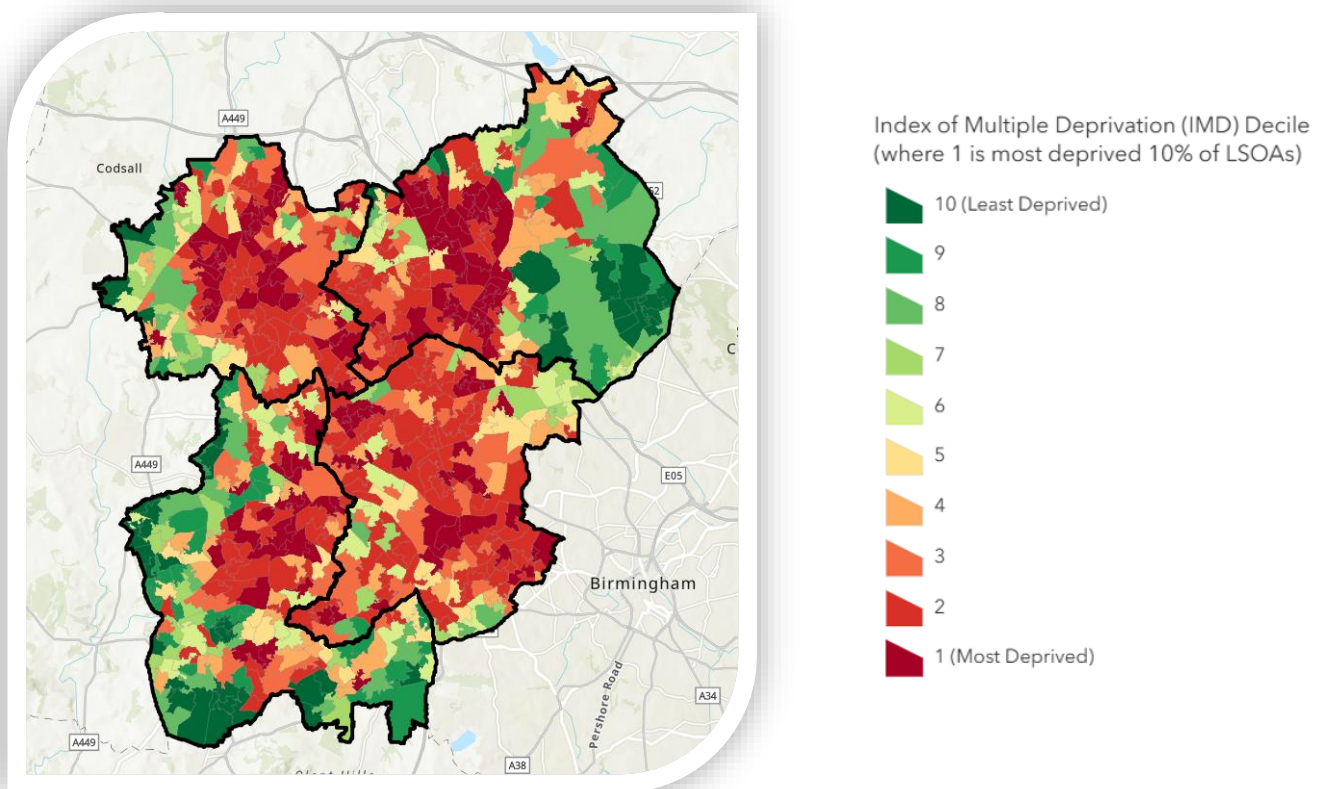
¹⁸ ONS, International trade in UK nations, regions and cities: 2023, released 2025.

1.3. Place

Deprivation Challenges and Low-Income Areas

- The Index of Multiple Deprivation (IMD)¹⁹ is the official measure of relative deprivation in England and is part of a suite of outputs that form the Indices of Deprivation (IoD). This allows local authorities to be ranked from 1 (most deprived) to 296 (least deprived) in England. **Overall, the ranking of three of the Black Country local authority areas improved when compared to 2019: Dudley placed 103rd (from 91st), Sandwell placed in 19th (from 12th) and Walsall placed 28th (from 25th). Whereas Wolverhampton declined slightly, moving to 23rd place (from 24th).**
- **44.3% (320) of Lower Super Output Areas (LSOAs) in the Black Country area are in the top 20% most deprived areas.** Of these, 18.0% (130) of LSOAs are in the top 10% most deprived areas. Due to a change in geographical boundaries, a direct comparison to 2019 cannot be made. However, 311 LSOAs that were identified as deprived in 2019 are still active in 2025 analysis. **There were 8 fewer LSOAs in the top 10% and 22 fewer in top 20%, while 29 LSOAs moved into the 3rd decile and 1 into the 4th decile.**

IMD 2025, Overall Decile per LSOA:



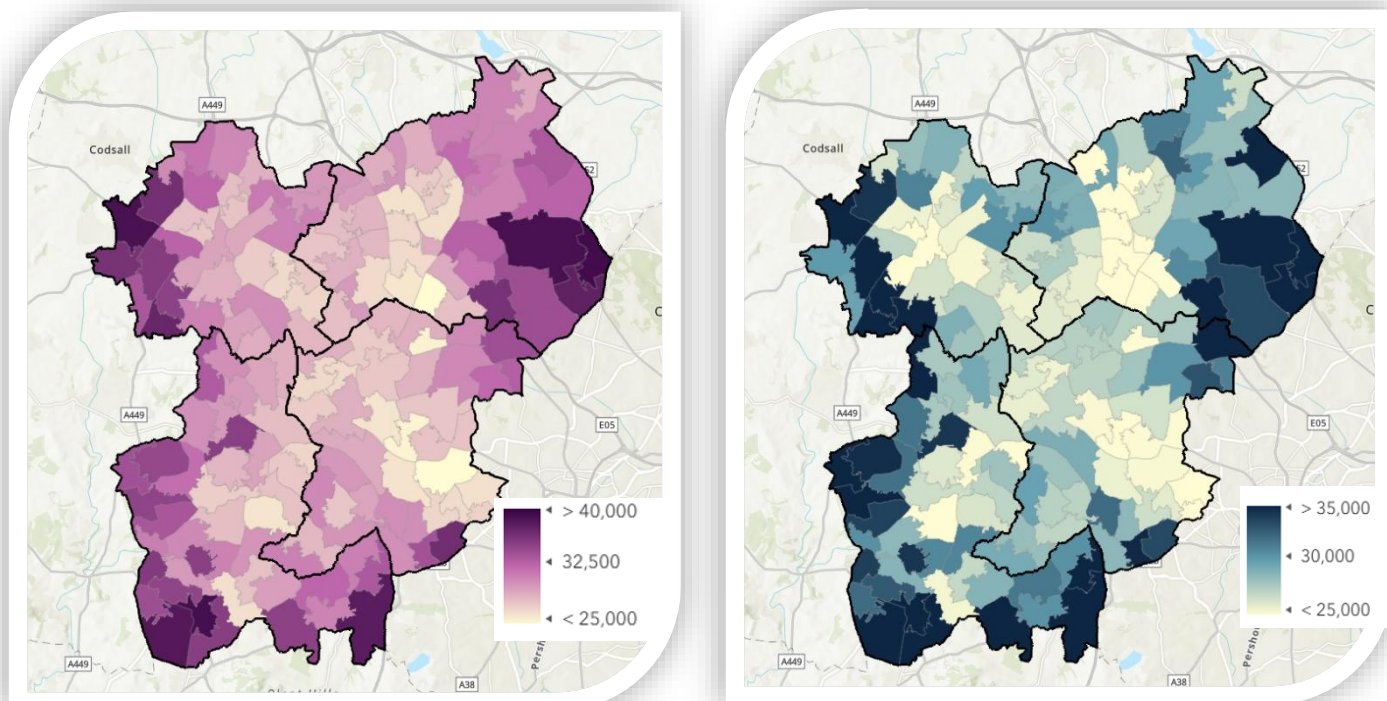
- In the financial year ending 2023, the mean equivalised household disposable (net) income²⁰ before housing costs varied within the Black Country from £24,304 to £39,254. **With 94.2% (145 MSOAs) under the England and Wales average of £36,800.**

¹⁹ Ministry of Housing, Communities and Local Government, English indices of deprivation 2025

²⁰ ONS, Income estimates for small areas, England and Wales: financial year ending 2023, 2025

- While the mean equivalised household disposable (net) income after housing costs varied within the Black Country from £20,880 to £39,258. **With 85.7% (132 MSOAs) under the England and Wales average of £34,500.**

Net Annual Income Before Housing Costs (Left) and Net Annual Income After Housing Costs (Right):



Developing a Connected and Built Infrastructure

- There are **shortfalls in housing supply to the demand**; to address this, the government has set a national target of building 1.5m new homes in the next five years, with the WMCA area setting a target of 12,200 homes per year. This also links in with the [WMCA Spatial Development Strategy \(SDS\)](#) where one element is about long-term plans for housing (as well as jobs, transport and green spaces). **Provisional estimates for the Black Country show 2,354 net additional homes** leading to a total of **approximately 514,055 homes²¹ overall in 2025.**

Black Country Summary of Net Additional Homes and Total Stock:

	Net Additional Homes (2024/25)	Total Homes (2025)
Dudley	686	142,236
Sandwell	596	137,002
Walsall	651	119,232
Wolverhampton	421	115,585
Black Country	2,354	514,055

- There is also a region-wide **affordable housing crisis**, the Government have recently backed the [WMCA Social and Affordable Home Programme](#). In the Black Country, there were **75 social housing completions²² in 2024/25 – highest number completed since 2017/18**. There were also **799 affordable homes completed** – a second consecutive annual increase.

²¹ Department for Levelling Up, Housing and Communities, Live tables on housing supply: net additional dwellings and on dwelling stock, both released 2025.

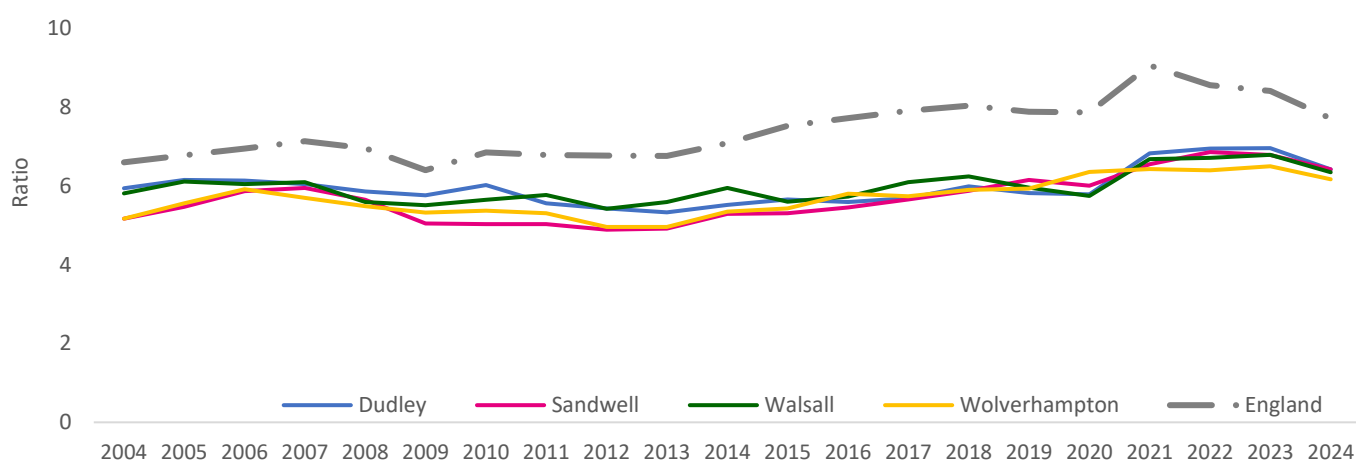
²² Ministry of Housing, Communities and Local Government, affordable housing supply statistics, 2025

Black Country Summary of Social Homes and Affordable Homes Completed 2024/25:

	Social Homes	Affordable Homes
Dudley	15	205
Sandwell	0	226
Walsall	60	141
Wolverhampton	0	227
Black Country	75	799

- Housing affordability ratios²³ show that in 2024, overall, residents in the Black Country could **expect to spend around 6.3 times their annual earnings buying a home**. The figures were broadly similar across the four local authorities. The equivalent figure in England was 7.7 times their annual earnings.

Ratio of Median House Price to Median Gross Annual Residence-Based Earnings Trends:



- Looking at the efficiency of housing by using Energy Performance Certificates (EPCs)²⁴ shows in the year ending March 2024 (based off rating bands for a 10-year period), **where Band A is very efficient and Band G is very energy inefficient, nearly 90% of Black Country lodgements were in Band C (32.2%), Band D (43.0%) and Band E (13.4%)**. Patterns were similar across all four local authorities.
- Challenges remain with households in fuel poverty²⁵** as data shows the West Midlands region continues to have the highest rates at 16.7%, compared to 11.4% overall for England in 2023. **For the Black Country, 17.5% (85,942) of households were fuel poor** in 2023, an annual decrease of 18.7% (-19,814). Across all local areas (in England), at 18.7%, Wolverhampton was the 3rd highest (remaining the same rank as 2022), Sandwell was 4th highest (from 5th) at 18.5%, Walsall was 7th highest (from 6th place) at 17.2% and Dudley was 15th highest at 15.8% (from 21st place).
- Across the Black Country as of March 2025, there was a total of **38,830 non-domestic properties²⁶**, which has **remained unchanged since March 2024**, whereas England-wide saw a small drop of 0.1%. The following table shows the annual change for overall non-domestic properties and the graph shows a further breakdown of properties by retail, office, industry and other for the Black Country local authorities in 2025.

²³ ONS, Housing affordability in England and Wales, released 2025

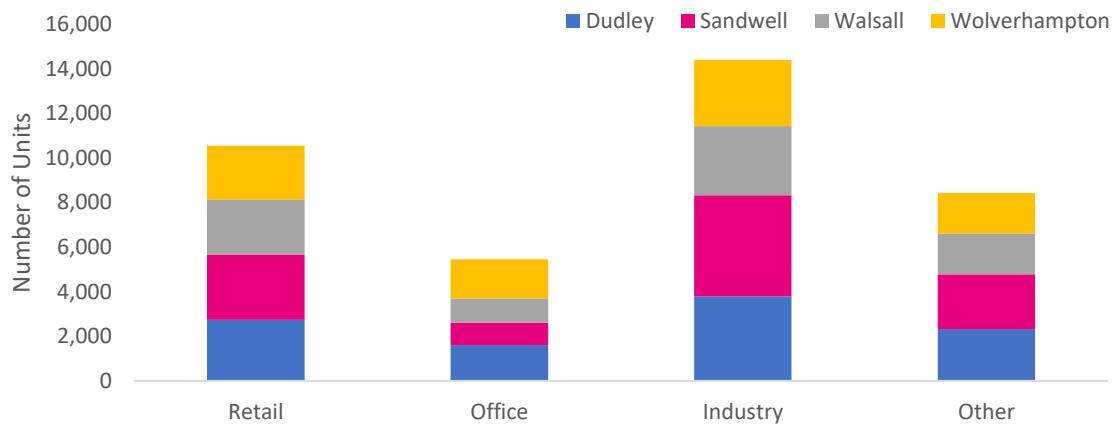
²⁴ ONS, Energy efficiency of housing, released 2025. This data does not reflect all dwellings in England and Wales, because not every dwelling has an EPC.

²⁵ Department for Energy Security & Net Zero, Sub-regional fuel poverty in England, released 2025

²⁶ Valuation Office Agency, Non-domestic rating: stock of properties collection, released 2025 (figures may not sum due to rounding)

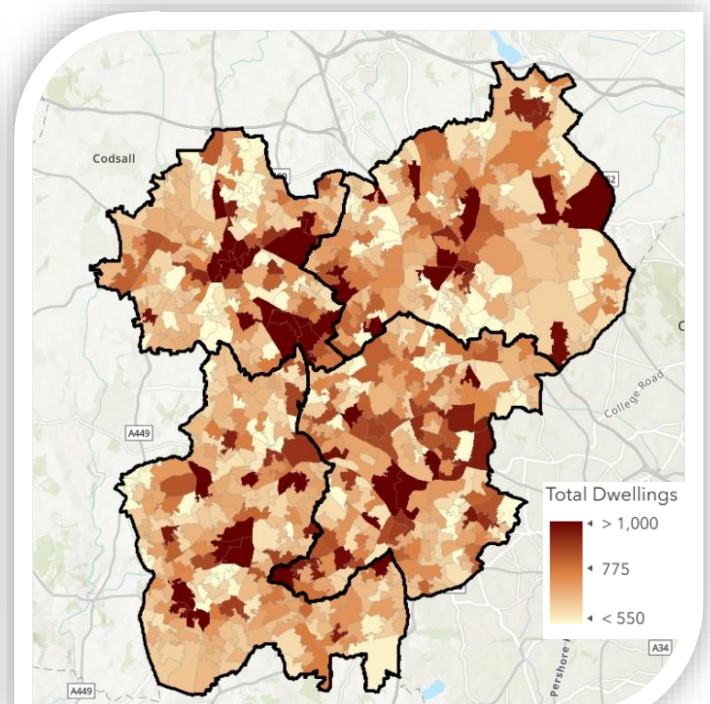
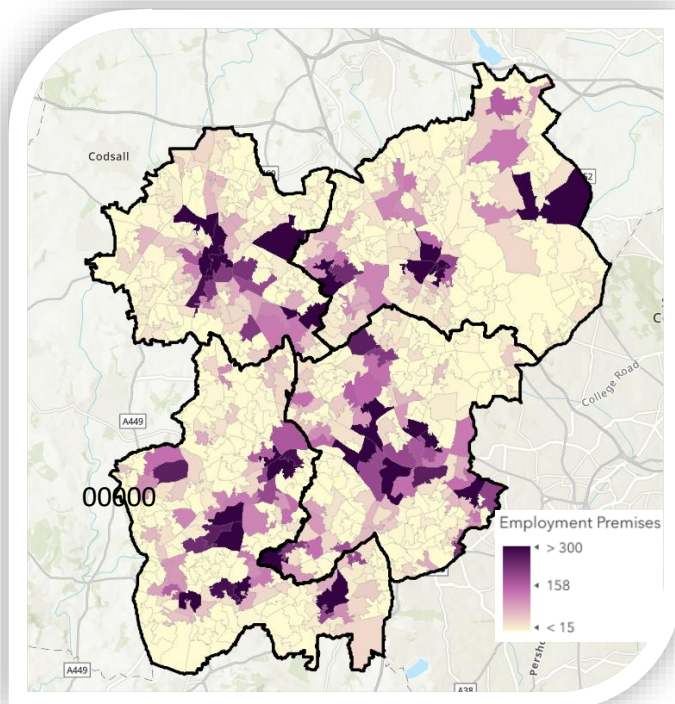
Total Non-Domestic Properties (2024/2045) followed by Type (2025):

	2024	2025	Annual Change
Dudley	10,510	10,460	-0.5%
Sandwell	10,950	10,930	-0.2%
Walsall	8,450	8,470	0.2%
Wolverhampton	8,920	8,970	0.6%
Black Country	38,830	38,830	0.0%
England	2,004,870	2,003,610	-0.1%



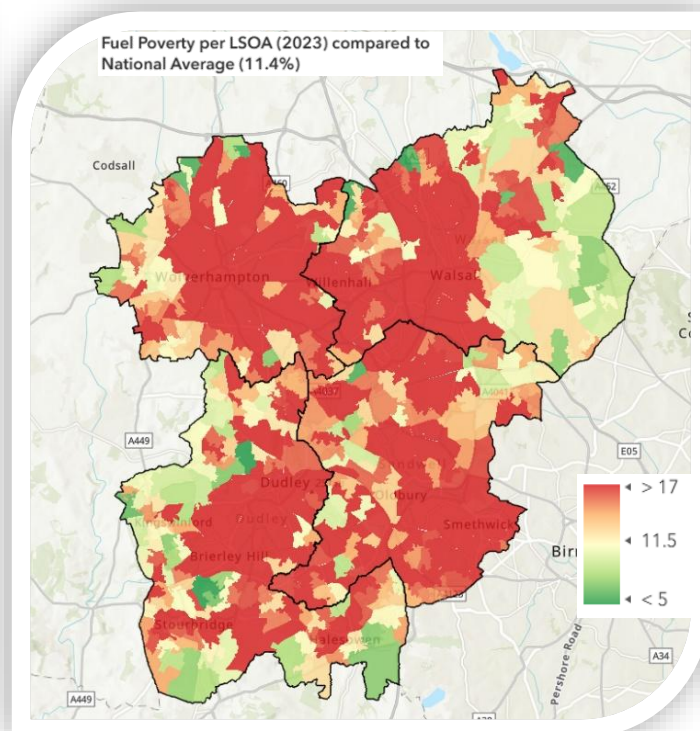
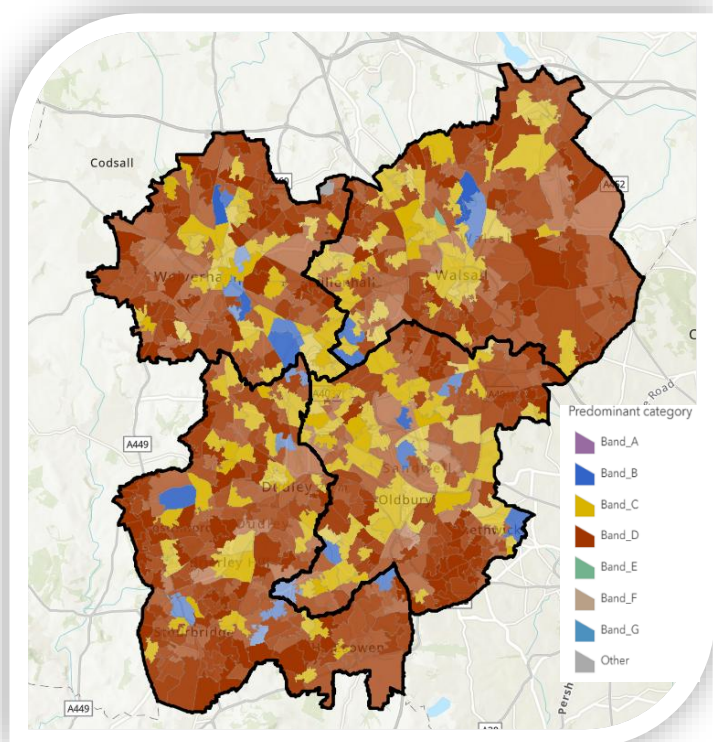
- The Black Country continues to perform well overall for broadband connectivity²⁷. As of July 2025, nearly 90% of premises had full-fibre connectivity, above the UK-wide figure of 78.2%. All four areas were above the UK.

Employment Properties (Left) and Dwellings (Right), per LSOA:



²⁷ Ofcom, Connected Nations, released 2025

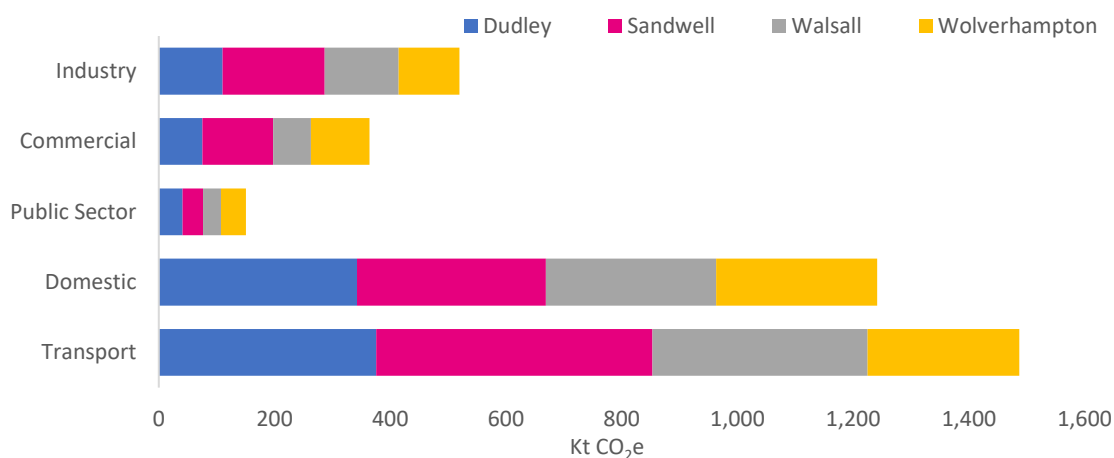
EPCs (Left) and Fuel Poverty (Right), per LSOA:



Net Zero Challenge

- In 2023, the Black Country produced a **total of 3,781 Kt of carbon dioxide (CO₂e) emissions²⁸**, a 5.6% decrease compared to 2022. National emissions decreased by 5.7%. **All four Black Country local authorities decreased** over this period. Longer term (since 2005), emissions have decreased by 50.2% for the Black Country overall (England decreased by 47.6%); Dudley decreased by 50.4%, Sandwell by 49.0%, Walsall by 50.0% and Wolverhampton by 51.7%. However, **there is still a long way to go to reach Net Zero by 2041**.

Dominant Sector Breakdown of Black Country Carbon Dioxide Emissions, 2023:



²⁸ Department for Energy Security and Net Zero, UK local authority & regional greenhouse gas emissions national statistics, released 2025

Pipeline Infrastructure Developments

The following map shows a selected number of large-scale infrastructure developments in the pipeline across the Black Country:



1.4 People

Population and Vulnerable Communities

- In 2024, the **Black Country had a population of over 1.26 million²⁹**, with **annual growth of 1.4%, slightly above the national rate of 1.2%**. Wolverhampton (+2.1%) and Walsall (+1.5%) both outpaced the national increase, while Sandwell matched it.
- As seen in the following table, **every Black Country local authority had a higher proportion of residents aged 15 and under than the national average**. In addition, Sandwell had a higher share of working-age residents (16 to 64) and Dudley a higher proportion of residents aged 65 and over compared with England.

Breakdown of Population by Age, 2024:

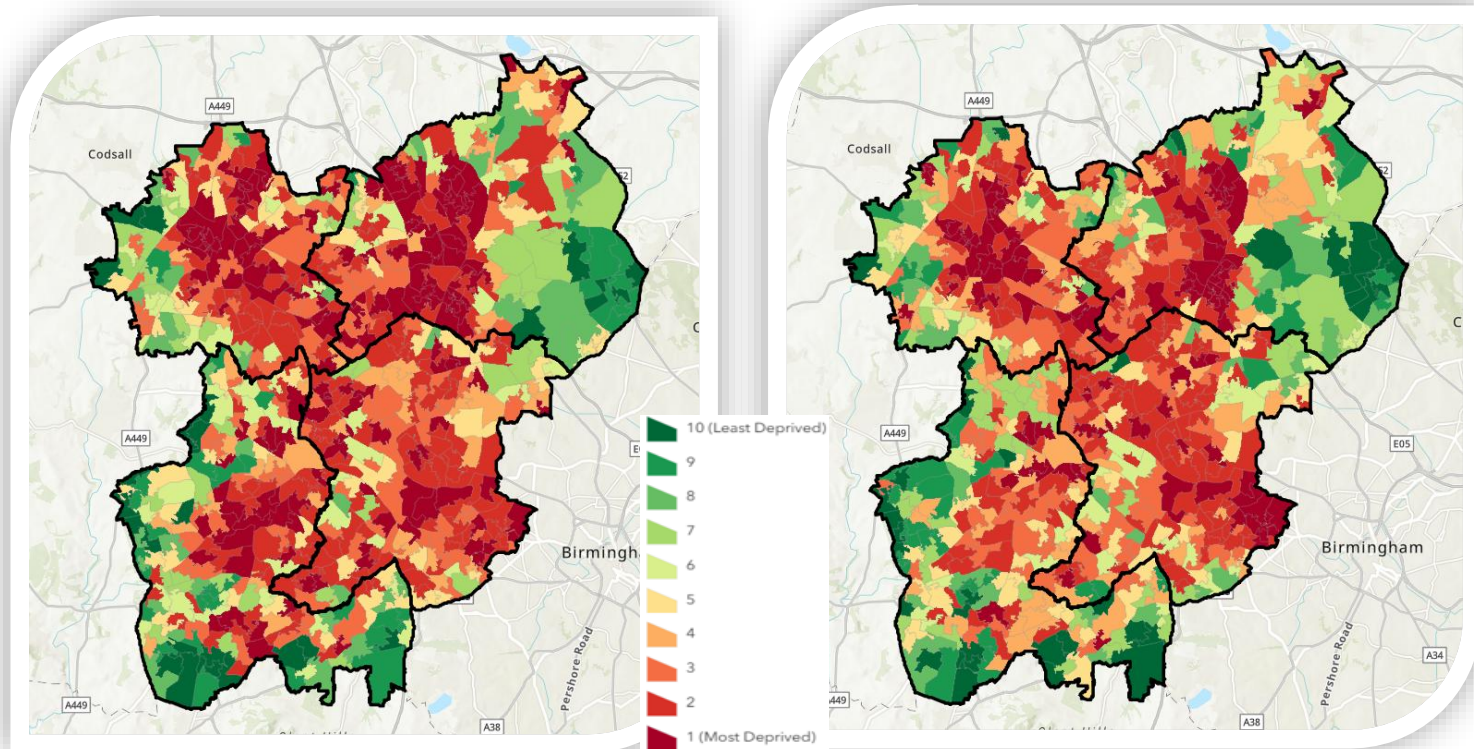
	All Ages	Aged 0 to 15		Aged 16 to 64		Aged 65+	
	Number	Number	Percent of Total	Number	Percent of Total	Number	Percent of Total
Dudley	331,930	63,221	19.0%	201,634	60.7%	67,075	20.2%
Sandwell	353,860	78,758	22.3%	223,861	63.3%	51,241	14.5%
Walsall	295,678	63,682	21.5%	181,408	61.4%	50,588	17.1%
Wolverhampton	281,251	60,611	21.6%	175,532	62.4%	45,108	16.0%
Black Country	1,262,719	266,272	21.1%	782,435	62.0%	214,012	16.9%
England	58,620,101	10,768,248	18.4%	36,870,761	62.9%	10,981,092	18.7%

- As part of the IMD suite³⁰, there are two supplementary indices, the first being, Income Deprivation Affecting Children Index (IDACI) which measures the proportion of all children aged 0 to 15 living in income deprived families.
- **Three of the Black Country local authorities had over 50% of children that are reported as living in income deprived households.** Walsall was 12th highest in the country at 54.6%, followed by Sandwell in 13th place with 54.4% and Wolverhampton in 18th place with 52.8%. Dudley was 51st highest with 43.2% of children living in income deprived families.
- **44.7% (323) of LSOAs in the Black Country area are in the top 20% most deprived areas in terms of IDACI.** Of these, 21.4% (155) of LSOAs are in the top 10% most deprived areas.
- In addition, there is also the Income Deprivation Affecting Older People Index (IDAOPI) which measures the proportion of all those aged 60 or over who experience income deprivation.
- **On average, Black Country local authorities had around 25% of people aged 60 or over that experience income deprivation.** Compared across the country, Sandwell was 24th highest (29.0%), Wolverhampton was 35th highest (26.0%), Walsall was 40th highest (23.8%) and Dudley was 83rd highest (17.2%).
- **35.5% (257) of LSOAs in the Black Country area are in the top 20% most deprived areas in terms of IDAOPI.** Of these 13.4% (97) of LSOAs are in the top 10% most deprived areas.

²⁹ ONS, mid-year population estimates, 2025

³⁰ Ministry of Housing, Communities and Local Government, English indices of deprivation 2025

IDACI (Left) and IDAOPI (Right), By Overall Decile per LSOA:

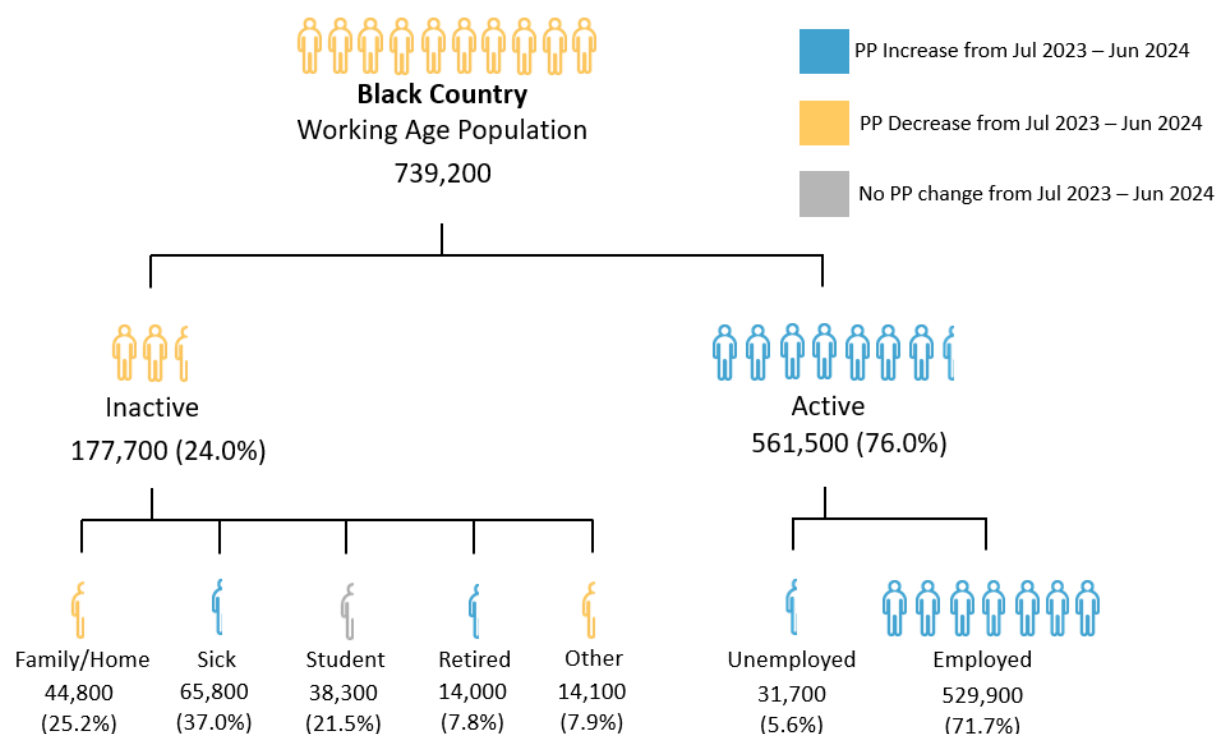


Struggling Labour Market

- The **Black Country's labour market is likely to face acute pressures in 2026** amid the [UK's Get Britain Working](#) reforms. This national initiative aims for an 80% employment rate and measurable reductions in inactivity gaps.
- The employment rate³¹ in the Black Country stands at 71.7% (compared to 75.8% nationally), requiring an **additional 61,460 people to enter work to meet the government target, a shortfall exacerbated by geographic disparities**. Sandwell (65.7%) and Walsall (71.8%) underperform sharply compared to Dudley and Wolverhampton (both at 75.1%), yielding local gaps of 29,820 and 14,320 people, respectively.
- In addition, economic inactivity hovers at 24.0%, **fuelled by long-term sickness, suggesting health barriers over mere vacancy shortages**.

³¹ ONS, Annual Population Survey, 2025.

Labour Market Activity, for the Period of July 2024 – June 2025 and the Percentage Point Change Since July 2023 – June 2024:



No data available for economically inactive - discouraged.

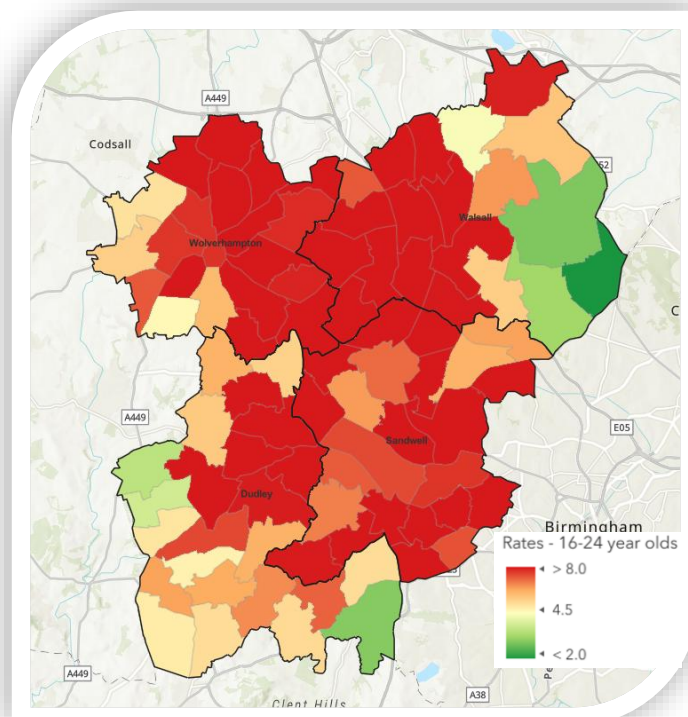
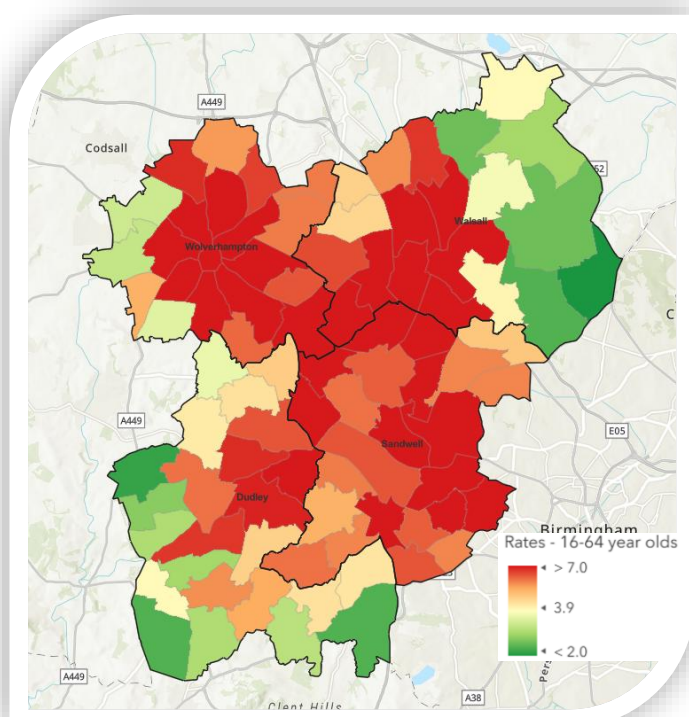
- At the end of 2024 / start of 2025, the proportion of those aged 16-17 years old that are Not in Employment, Education or Training (NEET)³² in the Black Country was 7.8% - this was over 2 percentage points higher than the national average. Figures varied from 21.5% in Dudley, 5.2% in Walsall, 3.8% in Wolverhampton and 2.6% in Sandwell.
- In the Black Country, the employment rate for residents classed as EA core or work-limiting disabled³³ was 45.0%, compared with 82.1% for those not in this category, a gap of 37.1pp. This disparity was wider than the national average of 24.6pp, with all local authorities exceeding the national figure, ranging from 29.8pp in Dudley to 47.4pp in Sandwell.
- In the Black Country, the female employment rate stood at 69.4% which was 4.6pp below the male rate of 74.0%. This gender gap was narrower than the national average of 6.5pp, with three local authorities recording smaller disparities than the national figure, while Wolverhampton's gap was wider at 8.3pp.
- To this end, the [West Midlands Works](#) framework offers a critical bridge, channelling national ambitions into regional action. Prioritising the Black Country's most challenged areas, it must scale integrated health and employment support to curb sickness-driven inactivity, boost higher-level qualifications and apprenticeships, and align training with resilient sectors. A coordinated, place-based rollout is essential to reverse the region's trajectory.

³² Department for Education, Participation in education, training and NEET age 16 to 17 by local authority, 2025. Please note, the figures include not known.

³³ ONS, Annual Population Survey, 2025.

- **Claimant numbers³⁴ in the Black Country remain elevated**, with approximately 47,000 individuals claiming jobseeker's benefits which is equivalent to 6.0% of the working age population, compared to the national rate of 4.0%.
- **Youth claimants aged 16-24 are particularly concerning**, at 7.5% in the Black Country compared to 4.4% nationally, **suggesting gaps in early career pathways, skills training, and work placement programs that leave young people disconnected from opportunities**. Among local authorities, Wolverhampton ranks third highest for youth claimants at 7.9%, followed by Sandwell (4th), Walsall (joint 5th), and Dudley (joint 21st). **These figures highlight persistent challenges in youth employment support across the Black Country.**

Claimant Rates per Ward for those aged 16-64 (Left) and 16-24 (Right) Compared to National:



- Another important consideration is **the potential for artificial intelligence (AI) to disrupt the job market**. However, its overall impact is **expected to be transformational rather than destructive**. With targeted policy interventions, **the Black Country labour market can capture the benefits of AI while minimising worker displacement**. AI is projected to gradually displace between 1 and 3 million jobs across the UK, with peak annual losses estimated at 60,000 to 275,000. Greater AI adoption should increase labour market dynamism, resulting in job transitions rather than mass unemployment, though upgraded support infrastructure will be needed for displaced workers.
- High-skilled occupations (managers, professionals) will see AI augmenting decision-making and analytics rather than replacing jobs. **Administrative roles are most at risk**, with up to 46% of tasks being automated. Skilled trades (electricians, plumbers, machinists) will see modest AI impact, requiring adaptation to smart tools. Service roles (healthcare, customer support, retail) will require digital and interpersonal skills to work alongside AI. **Process plant operators and elementary jobs will face high automation risk, but new supervisory roles will emerge.**

³⁴ ONS / Department for Work and Pensions, 2025.

Skills Shortages

- The skills challenge remains throughout the Black Country and overall, the proportion of working age residents with RQF 4+ qualifications³⁵ dropped to 35.3% in 2024. Wolverhampton was the only Black Country area to have an annual increase and remains closest to the national average (45.7% compared to 46.8%). For the Black Country to reach the national average it requires 81,471 residents to gain a qualification at Level 4 and above.
- In 2024, the proportion of working-age residents in the Black Country with no qualifications rose to just over 10%, following the national trend. Dudley recorded the lowest rate at 7.4%, while Wolverhampton was the only local authority to see a decrease (to 9.8%). Closing the gap to the national average would require 32,065 residents to gain qualifications.

Qualification Profile, 2024:

		Dudley	Sandwell	Walsall	Wolverhampton	Black Country	England
RQF4+	Numerator	73,700	61,400	46,300	69,100	250,500	16,117,900
	Percent	38.9%	29.7%	28.4%	45.7%	35.3%	46.8%
	Shortfall	14,882	35,133	29,935	1,522	81,471	
	Annual Change	-3.2%	-4.5%	-14.7%	7.5%	-3.3%	0.5%
RQF3 only	Numerator	38,800	43,600	43,700	28,100	154,200	7,064,000
	Percent	20.5%	21.1%	26.8%	18.6%	21.7%	20.5%
	Shortfall	-	-	-	2,852	-	
	Annual Change	-8.9%	26.4%	-5.2%	-9.1%	0.1%	-0.5%
RQF2 only	Numerator	55,000	54,700	42,200	23,100	175,000	6,610,900
	Percent	29.1%	26.5%	25.9%	15.3%	24.7%	19.2%
	Shortfall	-	-	-	5,866	-	
	Annual Change	-1.6%	4.0%	5.8%	-7.2%	1.0%	0.8%
RQF1 only	Numerator	1,400	2,700	4,600	6,000	14,700	889,500
	Percent	0.8%	1.3%	2.8%	4.0%	2.1%	2.6%
	Shortfall	3,489	2,627	-	-	-	
	Annual Change	-30.0%	-75.5%	9.5%	-9.1%	-38.2%	-0.4%
Other qualifications	Numerator	6,400	13,400	6,800	10,000	36,600	1,510,900
	Percent	3.4%	6.5%	4.2%	6.6%	5.2%	4.4%
	Shortfall	1,904	-	346	-	-	
	Annual Change	23.1%	-30.9%	-2.9%	-20.6%	-17.2%	-5.4%
No qualifications	Numerator	14,000	30,700	19,300	14,800	78,800	2,269,100
	Percent	7.4%	14.9%	11.8%	9.8%	11.1%	6.6%
	Shortfall	-1,529	-11,545	-8,568	-4,858	-32,065	
	Annual Change	62.8%	26.3%	1.6%	-19.6%	12.1%	6.8%

Overall Falling Numbers in Apprenticeship Starts

- In the 2024/25 academic year, the Black Country recorded **7,670 apprenticeship starts**³⁶, unchanged from 2023/24, compared with a national increase of 4.1%. By level, advanced apprenticeship starts increased in Walsall and Wolverhampton, intermediate starts increased in Sandwell, and higher apprenticeship starts increased in three Black Country local authorities (with no change in Sandwell).

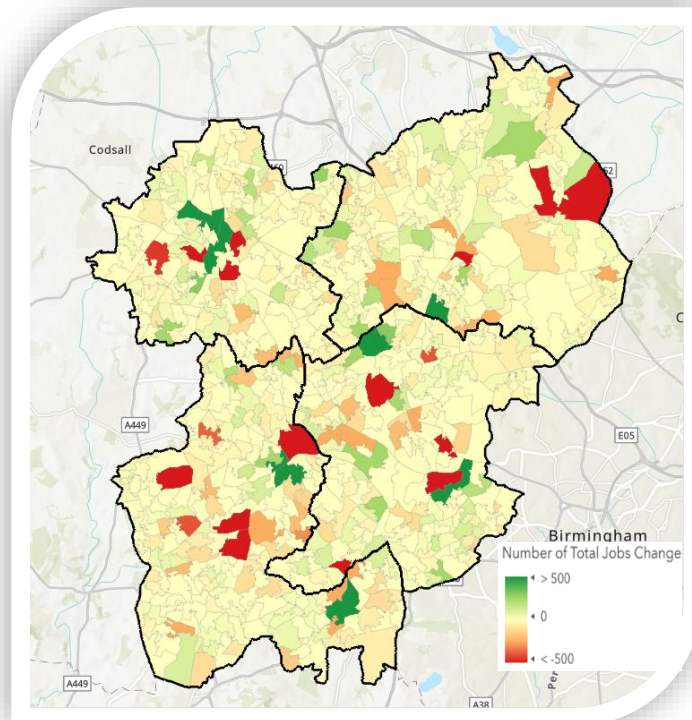
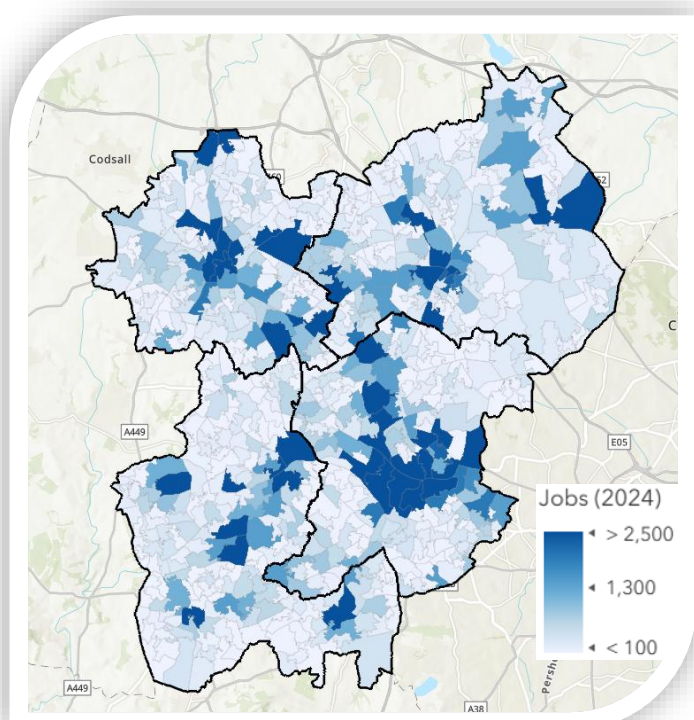
³⁵ ONS, Annual Population Survey, released 2025

³⁶ Department for Education, apprenticeships, released 2025

Overall Drop in Workforce Jobs

- After no change in Black Country job³⁷ numbers between 2022 and 2023, the **2024 figures show an annual decline of 1.6% (-7,000 jobs), bringing the total to 440,000**. This contrasts with a 0.6% increase in jobs across England. Within the Black Country, Wolverhampton was the only local authority to increase, by 1,000 (to 111,000). Whereas, Dudley decreased by 5,000 (to 106,000), Sandwell decreased by 2,000 (to 125,000) and Walsall decreased by 1,000 (to 98,000).

Total Number of Jobs (Left) and Annual Change (Right), per LSOA:



Growth in Wages but Gap Remains

- In 2025, full time average annual resident earnings³⁸ for the Black Country reached **£34,602, an annual increase of 4.6% (+£1,530) compared to an increase of 4.3% nationally**. Black Country earnings were approximately **88.2% of the England average (£39,243)**, a shortfall of £4,641. Wages increased in all four Black Country local authorities, as seen in the following table.

Residential Earnings Summary:

	2024	2025	Annual Change		Difference to National
Dudley	£34,786	£35,486	2.0%	£700	-£3,757
Sandwell	£31,920	£33,029	3.5%	£1,109	-£6,214
Walsall	£32,498	£34,036	4.7%	£1,538	-£5,207
Wolverhampton	£33,085	£35,858	8.4%	£2,773	-£3,385
Black Country	£33,072	£34,602	4.6%	£1,530	-£4,641
England	£37,636	£39,243	4.3%	£1,607	

³⁷ ONS, Business Register and Employment Survey, released 2025

³⁸ ONS, Annual Survey of Hours and Earnings, released 2025. Please note, the Black Country figure is an average.

- Dudley is the only Black Country local authority where female residents earn more than male residents (-2.5%). In terms of workplace earnings, females earn more than males in every local authority in the Black Country except for Walsall (10.9%). Nationally, the gender pay gap is 6.9%. Locally, the gender pay gap is higher for Walsall and Wolverhampton residents and for workers in Walsall.
- Across the Black Country, **workplace earnings remain below the national level (average £34,909 compared to £39,298 England) in 2025**. Workplace earnings vary from £33,636 in Sandwell, £34,980 in Walsall, £35,281 in Dudley and £35,740 in Wolverhampton. Compared to 2024, all Black Country local authorities saw increases in earnings, following the national trend.
- Low pay analysis shows nationally 14.6% of employee jobs were paid below the Living Wage Foundation rate in 2025. **All Black Country local authority areas had a higher percentage of jobs below the Living Wage Foundation rate**, ranging from 19.1% in Dudley, 19.0% in Sandwell, 18.8% in Walsall and 16.2% in Wolverhampton.

Economy as a Driver of Health

- In total, **the cost to the economy of working age ill-health and disability that prevents work³⁹ in 2022 is estimated to be between £240-330 billion in the UK**. Where data is available, the cost to the **Black Country** has been calculated at **£4.5 billion**.

Summary of the Cost of Working Age Ill Health and Disability that Prevents Work:

Cost element	Description	Cost to the UK	Cost to the Black Country
Economic inactivity	Lost output due to working-age ill-health which prevents work	£127bn-£188bn	£2.5bn (upper estimate)
Sickness absence	Lost output due to sickness absence	£38bn-£56bn	£620m
Informal care giving	Lost output due to working age carers caring for working age sick	£37bn	£606m
NHS cost	The additional costs to the NHS when someone with a health problem is economically inactive rather than economically active	£2bn	£5.6m
Benefits payments	Cost of social security benefits related to health conditions that prevent people from working	£36bn-£47bn	£806m
Total	Total expenditure in 2022	£240bn-£330bn	£4.5bn
of which: Exchequer flowbacks	Tax and National Insurance foregone due to health-related worklessness	£57bn	£986m

³⁹ The EIU analysis based off DWP, The cost of working age ill-health and disability that prevents work, 2025. Please note These estimates are not a definitive assessment of what savings might be achieved by further interventions to reduce ill-health or increase employment. The estimates in this costing can be regarded as the difference between current economic output, and the potential economic output if working age health conditions were not limiting or preventing work. This does not assume that all health issues could be resolved when entering work, rather that ill-health is no longer a barrier to work.

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