

West Yorkshire's Retrofit Sector Mapping Report 2025



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INTRODUCTION

This report, published by Green Economy, provides a deep dive into the scope and potential of West Yorkshire's retrofit sector supporting the region's ambitious climate and economic goals outlined in the West Yorkshire Climate and Environment Plan 2025–2038. This plan commits the region to becoming net zero carbon by 2038, with a strong emphasis on improving the energy efficiency of homes and buildings, reducing fuel poverty, and creating green jobs. Retrofitting existing housing stock is central to achieving these objectives.

This report provides detailed analysis of the local supply chain and workforce capabilities to deliver on this challenge, providing vital intelligence to inform policy and investment decisions, particularly as the West Yorkshire Combined Authority (WYCA) rolls out initiatives like the Homes Energy West Yorkshire one-stop shop, which aims to make retrofit advice and services accessible to all residents. The study also aligns with the UK Shared Prosperity Fund's goals of boosting local economies and life chances, supporting the Mayor's commitment to retrofit every social home in the region.

The data projects 26 per cent growth in West Yorkshire's retrofit sector by April 2026. While some of this growth can be attributed to businesses rebounding from the compounded shocks of 2020–2024 the sector is clearly performing beyond crisis recovery. While 2022 and 2023 saw sharp growth for many firms, growth plateaued into 2024, with many businesses still working to regain pre-pandemic turnover levels. Profitability has often been maintained through strategic adaptation and targeted support, but the ongoing cost-of-living crisis continues to challenge recovery timelines. Businesses have had to evolve, responding to shifting customer expectations, reconfiguring supply chains, and developing new services and propositions.

Against this backdrop, the retrofit sector's growth is being driven by a combination of public and private investment, targeted policy interventions, and increasing consumer demand. Government schemes such as the Warm Homes Local Grant, the Warm Homes: Social Housing Fund, the Boiler Upgrade Scheme and ECO4 are supporting households on low incomes, in poorly insulated homes, or with health vulnerabilities.

In parallel, the able-to-pay market is expanding, with low or zero interest finance options from high street providers and falling costs for solar PV and battery storage improving affordability and shortening the period to see return on investment (ROI).

Regulatory drivers are also accelerating retrofit activity. The introduction of **Awaab's Law** in October 2025 will require social housing landlords to address mould and damp issues within strict timeframes. Meanwhile, the push for minimum EPC ratings of C in the private rental sector is prompting landlords to invest in energy efficiency upgrades.

By identifying gaps in skills, supply chain capacity, and market readiness, this report will help ensure that West Yorkshire's retrofit sector is equipped to meet growing demand. It will also support the development of targeted interventions to unlock barriers to growth, such as access to finance, specialist knowledge, and skilled labour. Ultimately, this work will contribute to a more resilient, inclusive, and low-carbon regional economy.



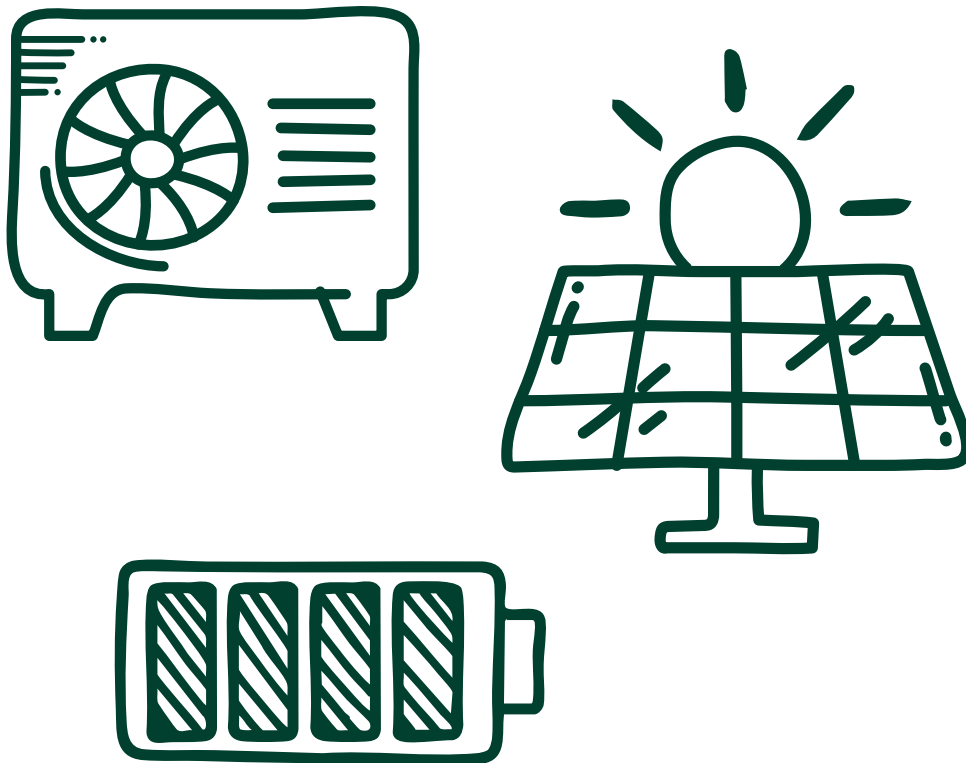
VICKY WILDING
Green Tech and Services Lead,
Green Economy



EXECUTIVE SUMMARY

In 2022/23, WYCA's Domestic Retrofit sector contributed £1.9bn to the region's economy, supported by 730 businesses employing 16,828 people. The sector experienced strong growth, with sales increasing by 8.4% from the previous year and accounting for 3.0% of the UK's Domestic Retrofit sales. The sector's contribution to WYCA's GDP (2.6%) aligns with national trends, while a higher sales-per-employee ratio indicates strong productivity compared to England. Energy Efficiency Measures dominated the sector, contributing 61% of sales, followed by Electricity & Heat at 27%. Key sub-sectors like Roof/Loft Insulation, Heat Pumps, and Energy Management collectively accounted for over half of the sector's total sales.

WYCA's Domestic Retrofit sector is forecast to grow by 26% by 2025/26, with notable growth in Energy Efficiency Measures (27%) and Electricity & Heat (25%). Exports valued at £379m in 2022/23, primarily from Roof/Loft Insulation, External Cavity Wall Insulation and Heat Pumps, matched the county's share of the UK market. Imports totalled £271m with significant activity in insulation and plastering sub-sectors. Installation activities formed the bulk of the sector's economic activity (52%), with manufacturing and advisory services also playing key roles. This growth trajectory highlights WYCA's strategic importance within the UK's wider Domestic Retrofit landscape.



Methodology

This report uses data from kMatrix, which maps the UK's Domestic Retrofit sector using a taxonomy-based approach. The analysis includes core retrofit activities and their supply chains, such as insulation, heating systems, and advisory services. All figures relate to the financial year 2022/23, unless otherwise stated. Forecasts extend to 2025/26 and are based on current market trends and policy drivers, including the UK's net-zero agenda.

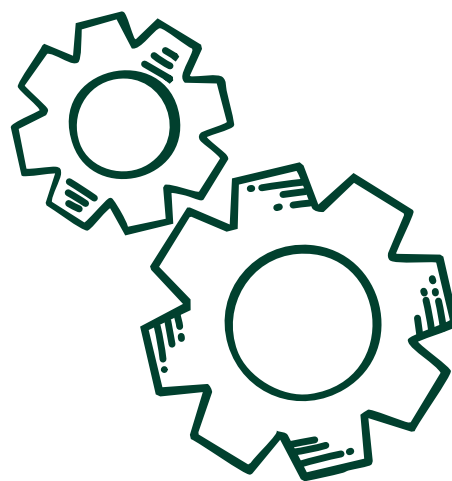
kMatrix takes a different approach to analysing markets compared to standard government statistics. Instead of starting "top-down" with broad industry codes (like SIC), it builds its datasets "from the bottom up." This looks directly at companies, products, and supply chains, before grouping them into sectors. This method ensures that industries that are hard to measure can be captured more accurately.

At the core of the method is data triangulation. Rather than relying on a single source, kMatrix compares and cross-checks thousands of data points from multiple sources. Each number is tested against other sources, past records, and industry expertise until a reliable "true" value emerges. This helps avoid the errors and blind spots that come with single-source data.

The process follows five key steps:

1. **Define** – Decide what activities and companies make up the sector.
2. **Assemble** – Gather data from many sources and filter out weak ones.
3. **Check** – Run quality checks to make sure the numbers line up.
4. **Validate** – Compare with expert knowledge, projects, and client feedback.
5. **Publish** – Finalise the dataset and calculate confidence levels.

This approach allows kMatrix to measure not just sales and company numbers, but also jobs, imports/exports, growth rates, and supply chain activity. It is flexible enough to handle new and emerging industries. kMatrix creates a more detailed and reliable picture of markets by piecing together evidence from multiple angles. The result is data that reflects what's actually happening on the ground, giving policymakers and businesses greater confidence in the data.



STATUS UPDATE ON THE RETROFIT SECTOR IN WEST YORKSHIRE

Sector Size

In 2022/23, the Domestic Retrofit sector contributed £1.9 billion to West Yorkshire's economy. The sector comprised 730 businesses, representing around 0.9% of all businesses in the region, and supported employment for 163,800 people, which is the equivalent to 1.6% of the economically active population.

Historical Growth

Between 2020/21 and 2021/22, sector sales increased by 7.1%, followed by a further 8.4% rise from 2021/22 to 2022/23. Overall, West Yorkshire accounted for 3.0% of all UK Domestic Retrofit sales and 3.5% of England's.

Forecast Growth

Looking ahead, total sales are projected to grow by 26%, reaching £2.4 billion by 2025/26. Within this, Energy Efficiency Measures are forecast to increase by 27%, from £1.18 billion to £1.49 billion. Electricity & Heat sales are expected to grow by 25%, rising from £524 million to £655 million. Sales of Making Good After Works* are projected to climb by 26%, from £171 million to £216 million, while Advisory & Related Services are forecast to grow by 26%, increasing from £45 million to £57 million.



*

Making good after works refers to efficiency improvements following the construction of a building e.g. triple glazing, ventilation, draft exclusion etc.



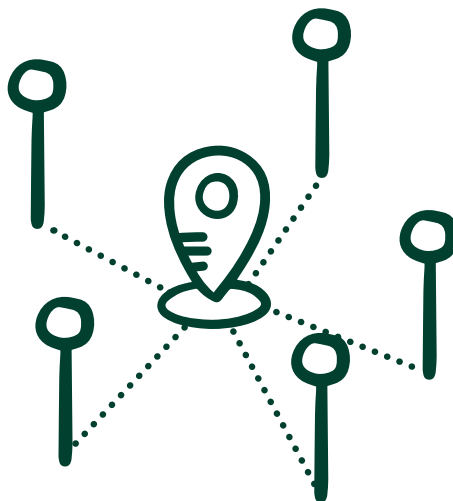
Exports and Imports

Exports from West Yorkshire's Domestic Retrofit sector were valued at £379 million, representing 3.0% of the UK market. The main exporting sub-sectors included Roof/Loft Insulation (£70.7 million), External Cavity Wall Insulation (£34.4 million), and Heat Pumps (£30.4 million). Imports totalled £271 million with the largest importing sub-sectors being Roof/Loft Insulation (£65.2 million), External Cavity Wall Insulation (£22.7 million), and Plastering & Plasterboarding (£19.4 million).

Market growth

The domestic retrofit market in West Yorkshire (WYCA) demonstrates significant growth potential, underpinned by its strong recent performance and promising forecasts. With a market value of £1.9bn in 2022/23, the sector has been growing steadily, outpacing national and England-wide growth rates. Sales are projected to increase by 26% to £2.4bn by 2025/26, driven by robust growth in key sub-sectors such as Energy Efficiency Measures (47%) and Electricity & Heat (25%). This trajectory highlights the expanding demand for retrofit solutions as part of the broader drive toward energy efficiency and decarbonisation.

WYCA's sector is characterised by high productivity, with a strong sales-per-employee ratio and a well-diversified business base of 730 firms. Significant export activity, valued at £379m, aligns with the region's share of the UK market, while imports (£217m) underscore opportunities to localise supply chains and increase regional competitiveness. Growth in specific sub-sectors like Roof/Loft Insulation, Heat Pumps, and Energy Management further highlights areas ready for investment and innovation. Additionally, the region's alignment with the UK's net-zero agenda and the rising need for sustainable housing solutions position WYCA as a key player in the national retrofit market.



Gaps and Opportunities

WORKFORCE DEVELOPMENT AND SKILLS

Despite strong sales growth, WYCA's domestic retrofit sector has a lower percentage of employment (1.6% of the active population) compared to the whole of England (2.1%). This suggests a need for upskilling workers to meet the growing demand for retrofit services. A business support programme focused on training and upskilling in these areas could help bridge this gap.

LOCALISED SUPPLY CHAINS

WYCA imported £271m worth of retrofit-related goods in 2022/23, less than its exports (£379m). This highlights opportunities to localise manufacturing and supply chains, particularly in insulation products, plastering materials, and renewable energy systems e.g., heat pumps. A support programme could encourage regional production to reduce reliance on imports.

INNOVATION AND R&D

WYCA's retrofit sector contributes 4% of its activities to R&D, which is slightly below the UK average of 5%. Investment in innovation, particularly in advanced retrofit solutions like smart energy systems, could be helped through grants / collaborative projects with local universities/research institutions.

BUSINESS DIVERSIFICATION AND MARKET ENTRY

Small businesses may lack the knowledge or resources to diversify into high-growth sub-sectors, such as heat pumps, ventilation systems, or floor insulation. Support programmes could focus on business advisory services, funding opportunities and networking to help companies enter these markets.

National Context

The UK government's commitment to upgrade five million homes over five years through the £6.6bn Warm Homes Plan, alongside the legally binding target to achieve net zero by 2050, provides a critical national policy driver for retrofit. However, the lack of a comprehensive, long-term retrofit strategy – particularly for private owner-occupied sector – risks slowing both market confidence and investment. Through mapping WYCA's local retrofit sector's strengths, gaps and capacity, this report aids understanding where local interventions can reinforce national policy gaps. This will ensure that businesses and residents can benefit from the growing retrofit economy.



STATUS UPDATE ON THE RETROFIT SECTOR BY LOCAL AUTHORITY

Leeds

HEADLINE FIGURES

In 2022/23, Leeds's Domestic Retrofit sector was valued at £891 million, supporting over 300 businesses and providing employment for more than 7,700 people.

Leeds contributed 46.5% of the West Yorkshire Combined Authority's (WYCA) domestic retrofit sales – a share slightly above its overall economic contribution to WYCA's GDP (45.2%).

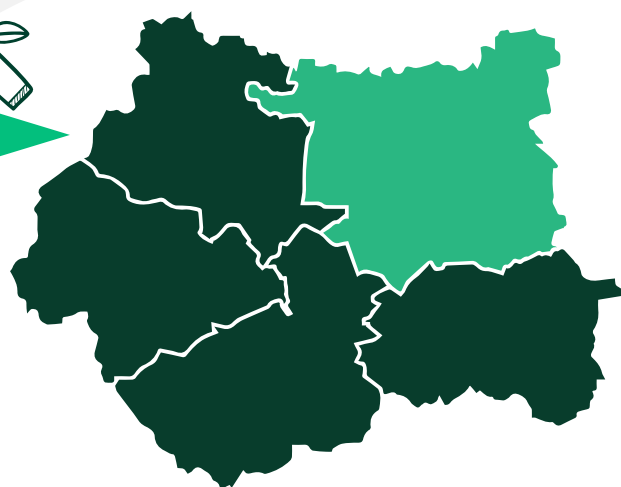
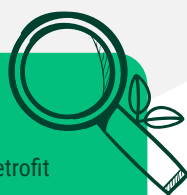
Sales from the sector accounted for 2.7% of Leeds's GDP, aligning closely with the figures for WYCA, England, and the UK (all around 2.6%). The sector is dominated by 17 key sub-sectors, which together generated 83% of sales in 2022/23. Leading sub-sectors included:

- Roof/Loft Insulation (£182m in sales; forecast to grow by 35% to £244m by 2024/25)
- External Cavity Wall Insulation (£78m; +25% forecast growth)
- Heat Pumps (£68m; +24% forecast growth)
- Plastering & Plasterboarding, Energy Management, and Floor Insulation also made significant contributions, each with strong growth forecasts (22–33%).

Overall, the sector is forecast to experience steady growth across most sub-sectors by 2024/25, reflecting rising demand for retrofit measures to improve energy efficiency and reduce carbon emissions.

LOCAL INSIGHTS

Leeds continues to demonstrate strength across multiple retrofit sub-sectors. Companies such as **Safegas Ltd** and **Northern Heatlink** are active in heating, cooling, and renewables, while **Solec Energy Solutions Ltd** and **Heron Electrical Ltd** are advancing in solar and battery technologies. Despite economic headwinds, these businesses have maintained stability and are now well-placed to benefit from national and regional retrofit programmes. Green Economy clients **JC Electrical Leeds** and **Wrapt Homes** are steadily growing within the able-to-pay market, reflecting increasing consumer demand. National players like **Linear Control Systems**, specialising in building management systems, highlight the broader opportunity for scalable retrofit innovation.



West Yorkshire Local Authority Sector comparators

LEEDS

Figure 3: Leeds and West Yorkshire Level 1 Measures for 2022/23

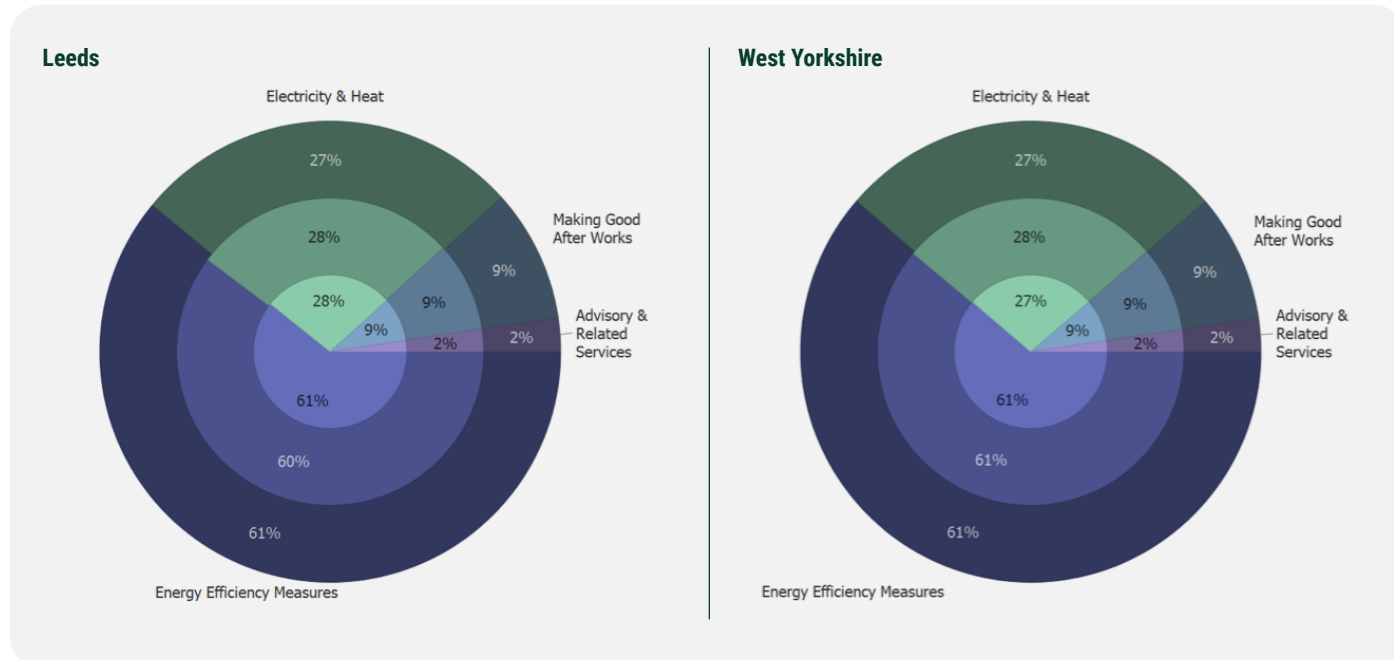
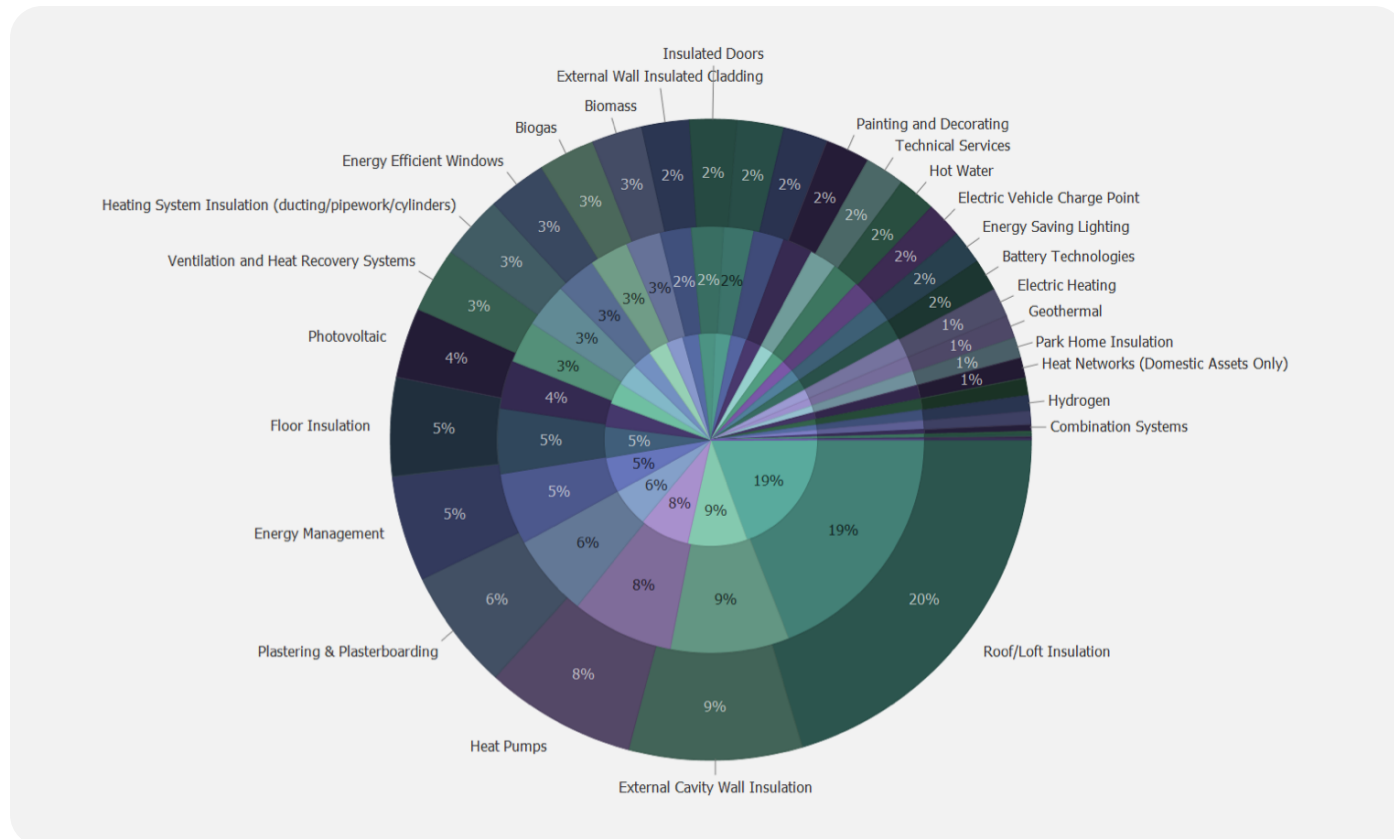


Figure 4: Leeds's Level 2 and Selected Level 3 sub-sectors for 2022/23



Calderdale

HEADLINE FIGURES

In 2022/23, Calderdale's Domestic Retrofit sector contributed £171 million to the local economy, supporting 66 businesses and providing jobs for over 1,500 people.

The sector made up 8.9% of the West Yorkshire Combined Authority's (WYCA) domestic retrofit sales, slightly above Calderdale's share of WYCA's GDP (8.4%).

Sales in the sector accounted for 2.8% of Calderdale's GDP – a higher proportion than the average for WYCA, England, and the UK (all around 2.6%).

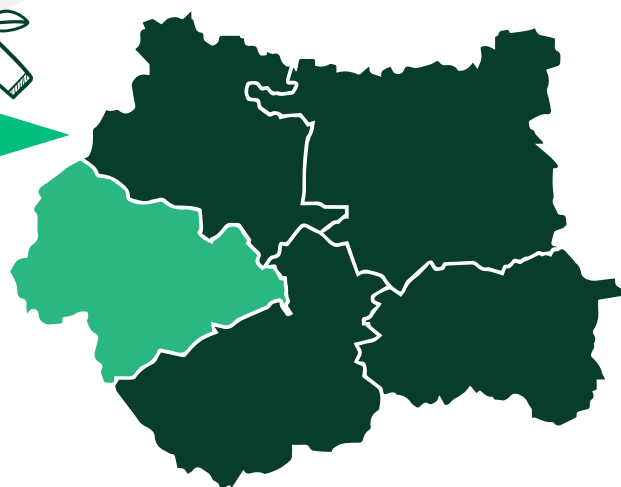
Seventeen key sub-sectors generated 83% of Calderdale's retrofit sales in 2022/23. The largest included:

- Roof/Loft Insulation (£34m; forecast to grow by 16% to £39m by 2024/25)
- External Cavity Wall Insulation (£15m; +33% forecast growth)
- Heat Pumps (£13m; +27% forecast growth)
- Energy Management and Plastering & Plasterboarding, each with strong growth forecasts of around 26–29%.

Overall, most sub-sectors are projected to see solid growth by 2024/25, reflecting continued demand for domestic energy efficiency improvements and low-carbon technologies.

LOCAL INSIGHTS

Calderdale's retrofit ecosystem is expanding through a mix of consultancy, software, and delivery. **Green View Projects**, **Green Deal Energy Advisor**, and **Heat Engineer Software** are all experiencing growth by capturing market share in a rising sector. **Maddison May Consulting**, active since 2019, is well-positioned to support regional delivery as a team of retrofit consultants, coordinators, and assessors. **Yorkshire Energy CIC**, based in Halifax, exemplifies community-focused retrofit delivery – operating nationally to upgrade heating systems and building fabric through schemes like ECO4. The organisation has grown to nearly **80 employees in 2024**, with further expansion anticipated as demand continues to rise.



West Yorkshire Local Authority Sector comparators

CALDERDALE

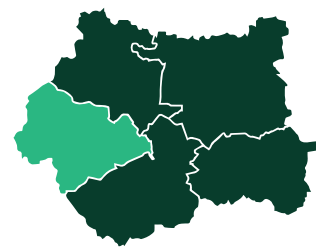


Figure 5: Calderdale and West Yorkshire Level 1 Measures for 2022/23

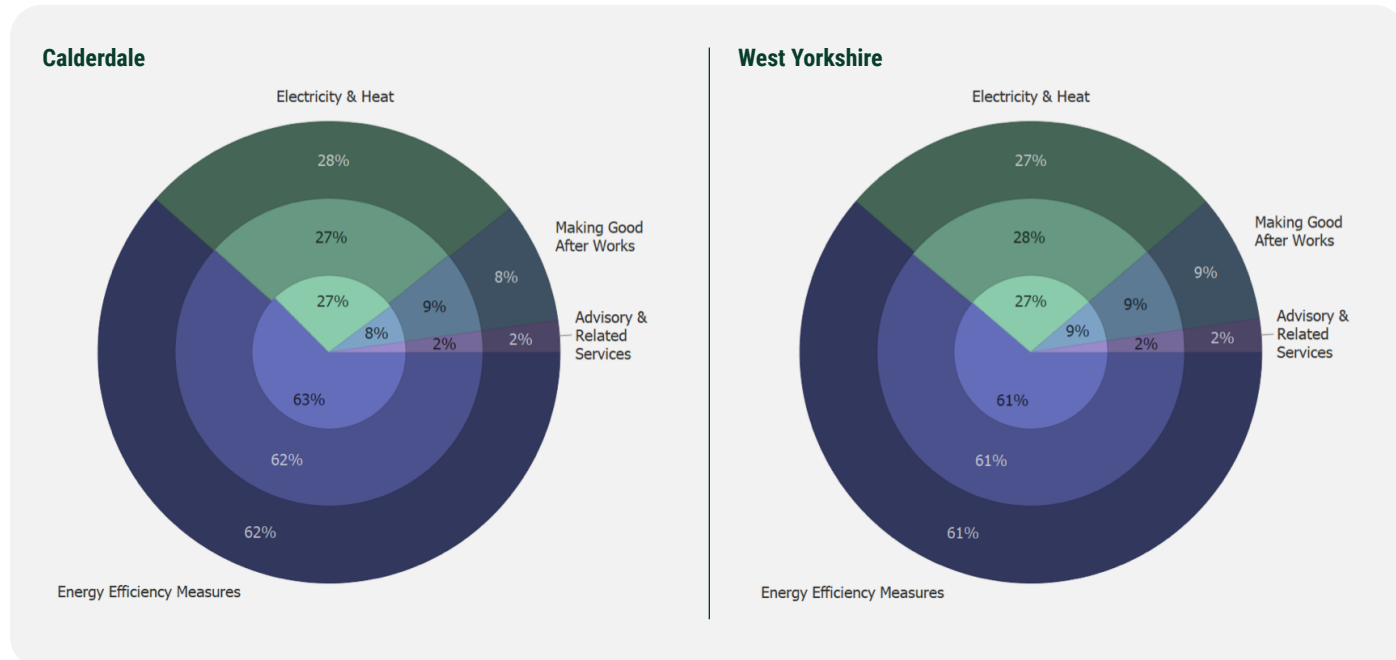
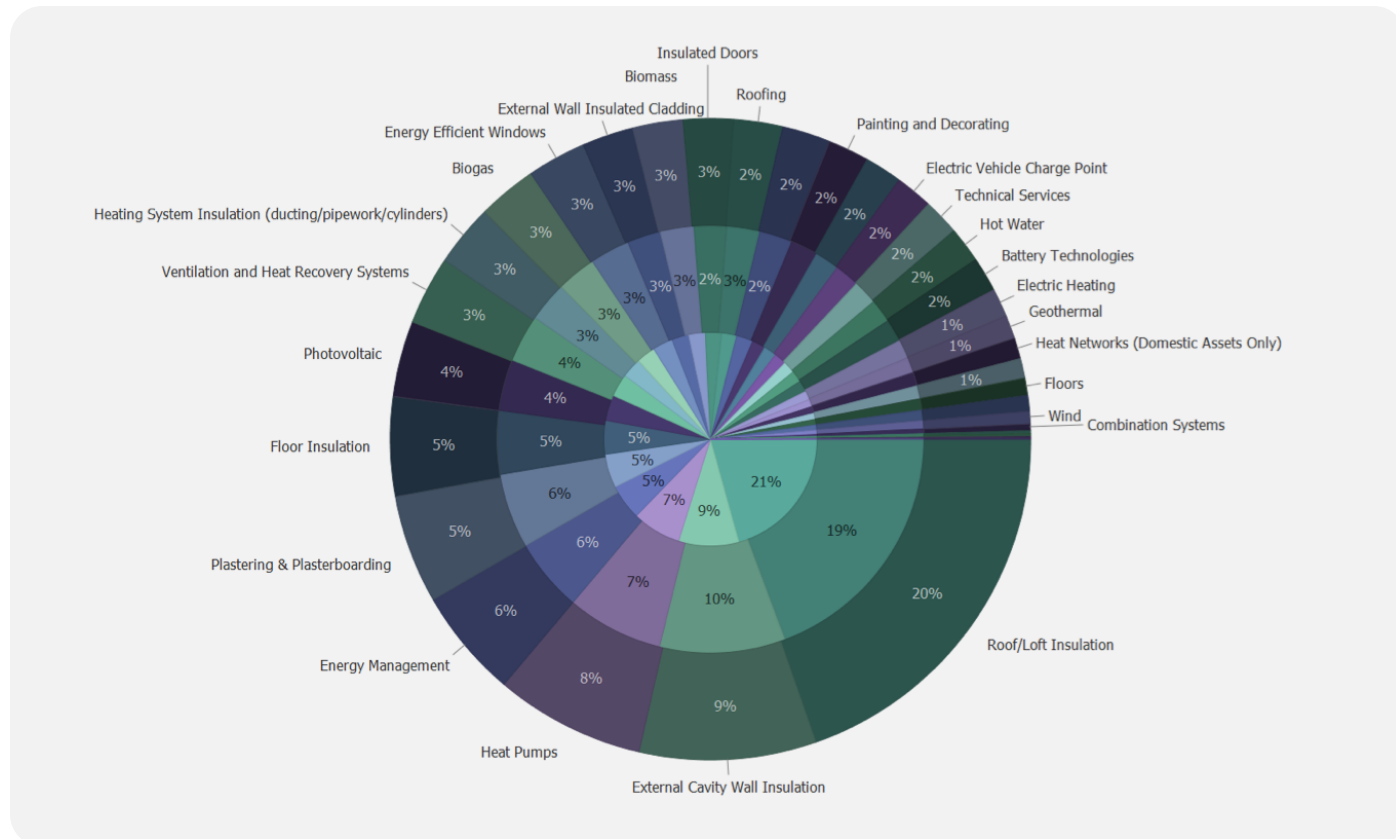


Figure 6: Calderdale's Level 2 and Selected Level 3 sub-sectors for 2022/23



STATUS UPDATE ON THE RETROFIT SECTOR BY LOCAL AUTHORITY

Kirklees

HEADLINE FIGURES

In 2022/23, Kirklees's Domestic Retrofit sector contributed £250 million to the local economy, supporting 96 businesses and employing over 2,200 people.

The sector represented 13.0% of WYCA's domestic retrofit sales – slightly below Kirklees's wider share of WYCA's GDP (14.4%).

Retrofit sales made up 2.5% of Kirklees's GDP, which is slightly below the average for WYCA, England, and the UK (2.6%).

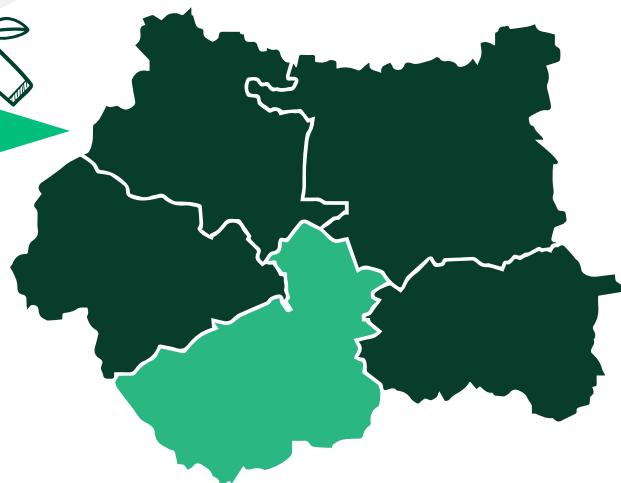
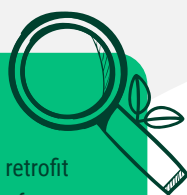
Seventeen main sub-sectors accounted for 83% of sales in 2022/23. Leading sub-sectors included:

- Roof/Loft Insulation (£55m; forecast to grow by 30% to £71m by 2024/25)
- External Cavity Wall Insulation (£19m; +28% forecast growth)
- Heat Pumps (£19m; +23% forecast growth)
- Other key contributors included Plastering & Plasterboarding, Energy Management, and Floor Insulation, all forecast to grow by around 22–29%.

Overall, most sub-sectors are expected to see steady growth by 2024/25, highlighting ongoing investment in energy efficiency and low-carbon technologies in Kirklees's housing stock.

LOCAL INSIGHTS

Kirklees is home to a mix of long-established and emerging retrofit businesses. **Michael Dyson Associates**, with over a decade of consistent growth, has expanded its workforce from **68 in 2015** to over **90 in 2024**, delivering retrofit and wider construction services. **Target Green**, founded in 2023, is gaining traction through UK-wide project delivery, including multiple schemes in Wales. **Heat Pump Installers UK** have maintained output through recent political and economic transitions and are well-positioned to capitalise on the growing adoption of low-carbon heating technologies.



West Yorkshire Local Authority Sector comparators

KIRKLEES



Figure 7: Kirklees and West Yorkshire Level 1 Measures for 2022/23

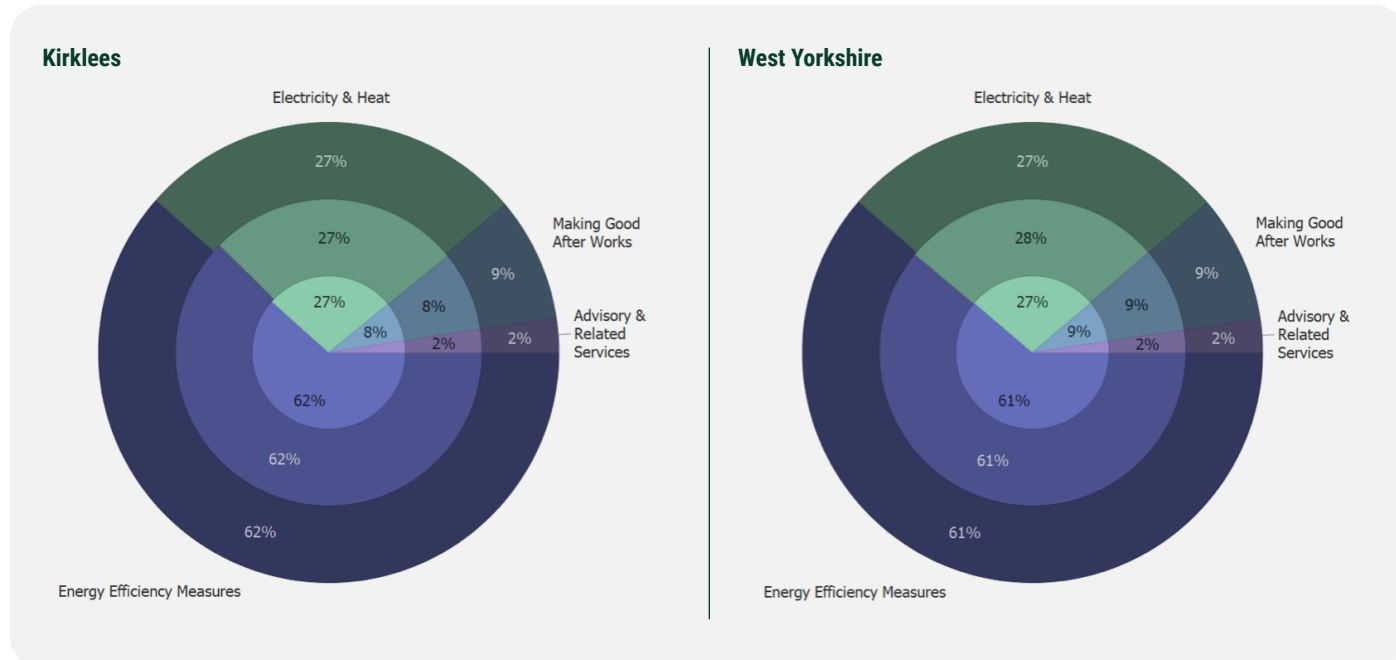
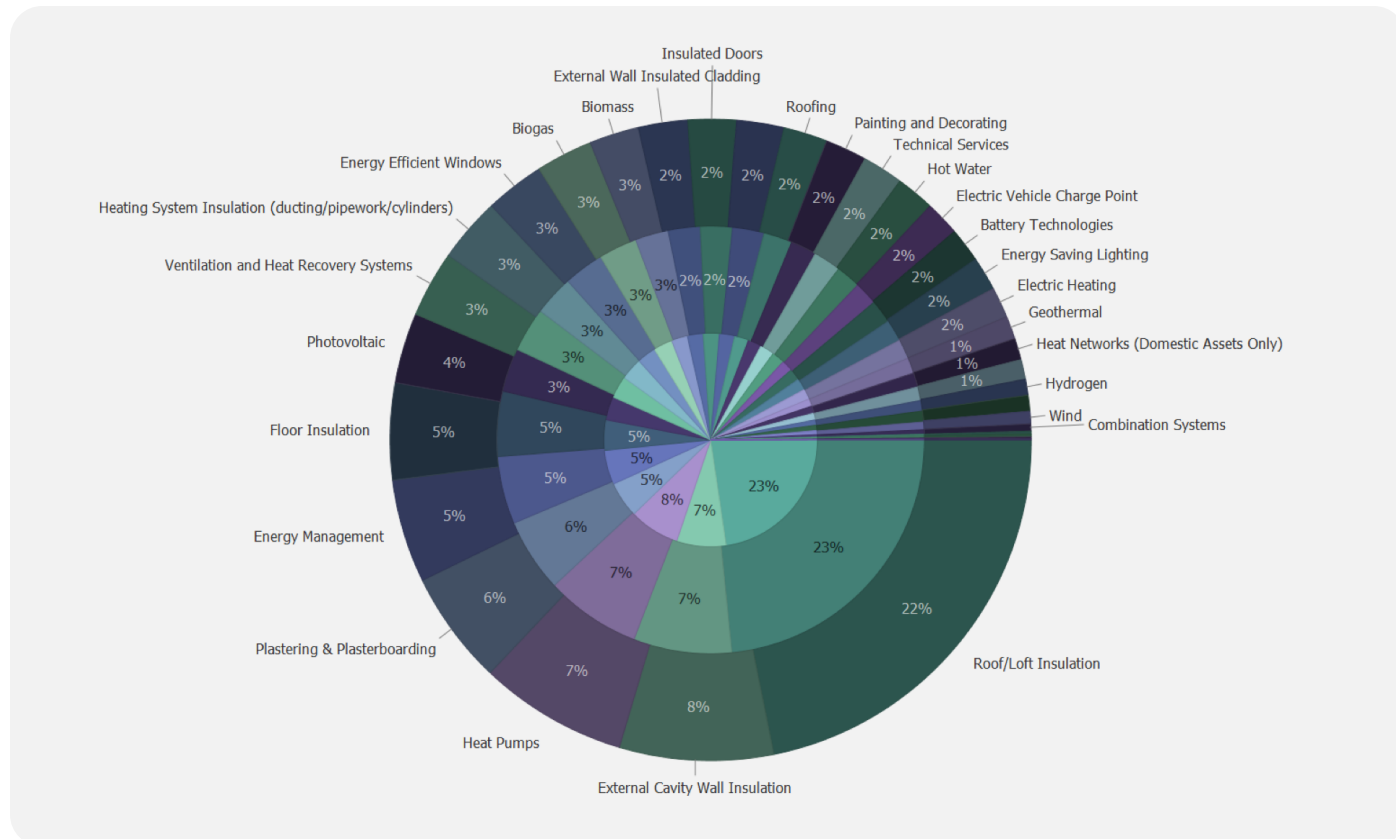


Figure 8: Kirklees's Level 2 and Selected Level 3 sub-sectors for 2022/23



STATUS UPDATE ON THE RETROFIT SECTOR BY LOCAL AUTHORITY

Bradford

HEADLINE FIGURES

In 2022/23, Bradford's Domestic Retrofit sector contributed £334 million to the local economy, supporting 127 businesses and employing over 2,900 people.

The sector accounted for 17.4% of WYCA's domestic retrofit sales – broadly matching Bradford's overall economic share of WYCA's GDP (17.6%).

Retrofit sales made up 2.6% of Bradford's GDP, which is in line with the average across WYCA, England, and the UK.

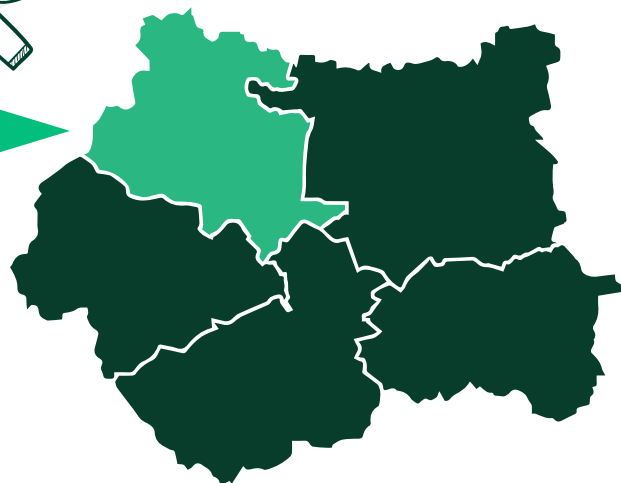
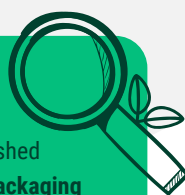
Seventeen key sub-sectors generated 83% of Bradford's retrofit sales in 2022/23. The largest included:

- Roof/Loft Insulation (£71m; forecast to grow by 24% to £87m by 2024/25)
- External Cavity Wall Insulation (£29m; +30% forecast growth)
- Heat Pumps (£25m; +26% forecast growth)
- Other notable areas were Plastering & Plasterboarding (with the highest growth forecast of 37%), Energy Management, and Floor Insulation (25–28% growth).

Overall, Bradford's retrofit market shows broad-based growth potential, underpinned by rising demand for insulation, low-carbon heating technologies, and energy efficiency improvements.

LOCAL INSIGHTS

Bradford's retrofit sector is underpinned by a mix of established manufacturers and expanding service providers. **Styrene Packaging & Insulation**, a regional manufacturer with international reach, reported turnover exceeding **£20 million in 2024** - a strong indicator of sector resilience and export potential. **Kensa Contracting**, headquartered in Cornwall, has strategically established a Bradford base to support its growing portfolio of renewable heating and retrofit projects across Yorkshire and the North. **Climaserve Limited**, operating in heating and ventilation, is also on a growth trajectory, well-positioned to meet regional retrofit demand. Green Economy clients including **P4 Solar** and **Infinity Innovations** are scaling up delivery and workforce capacity, contributing directly to sector growth and local employment.



West Yorkshire Local Authority Sector comparators

BRADFORD

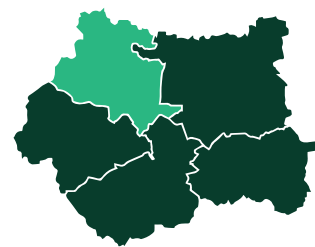


Figure 9: Bradford and West Yorkshire Level 1 Measures for 2022/23

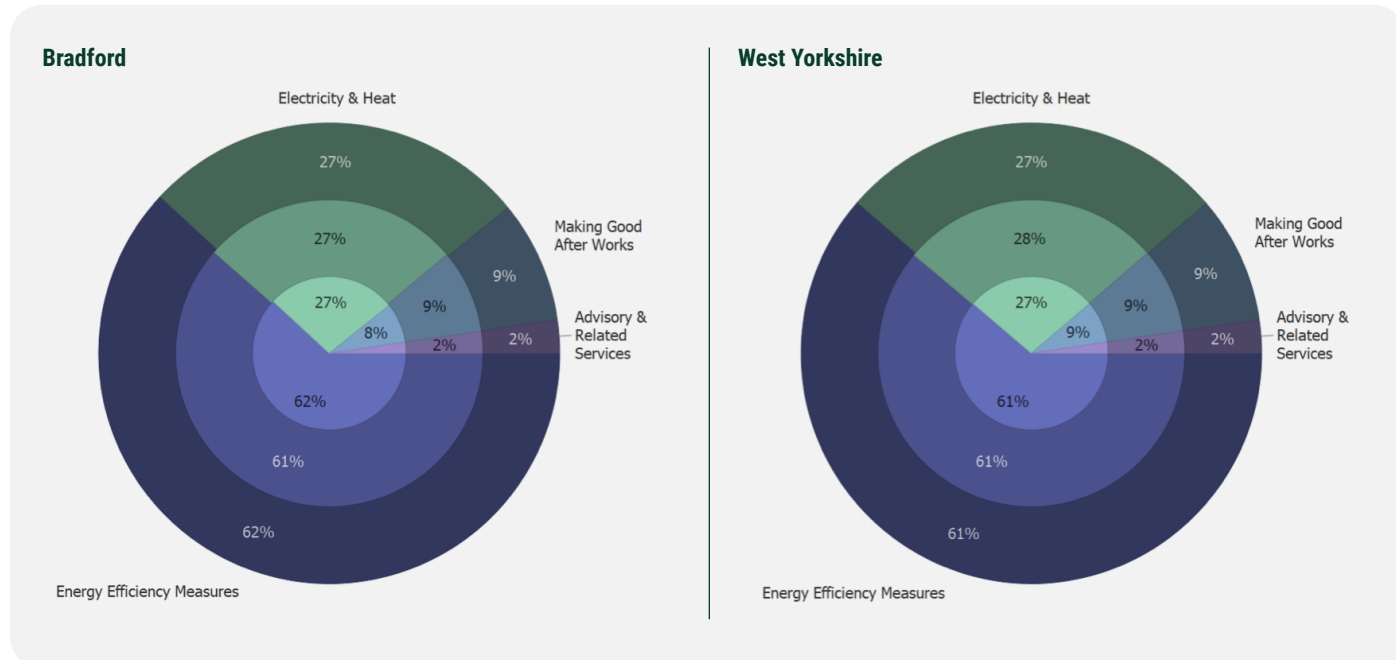
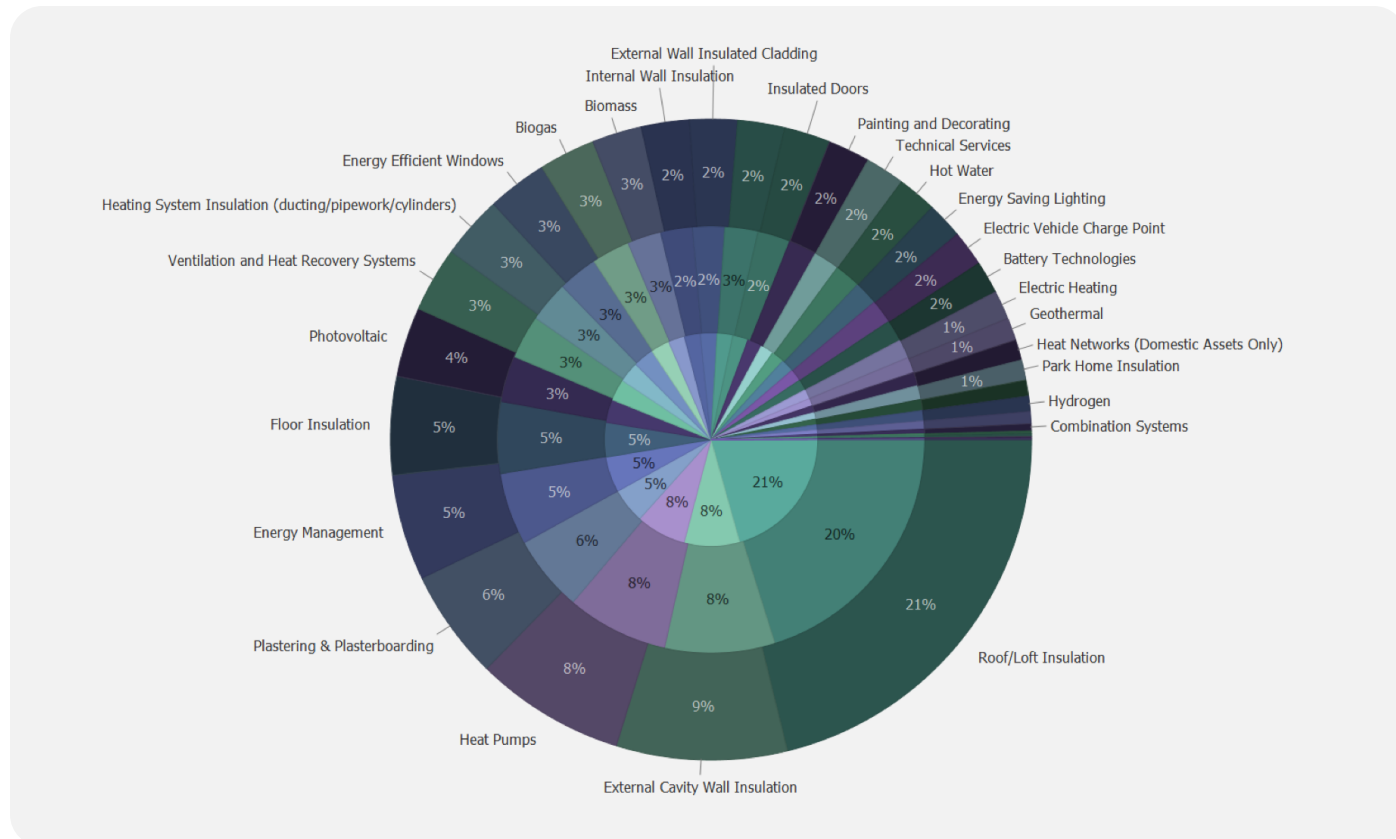


Figure 10: Bradford's Level 2 and Selected Level 3 sub-sectors for 2022/23



STATUS UPDATE ON THE RETROFIT SECTOR BY LOCAL AUTHORITY

Wakefield

HEADLINE FIGURES

In 2022/23, Wakefield's Domestic Retrofit sector was worth £270 million, supporting over 100 businesses and employing more than 2,300 people.

The sector accounted for 14.1% of WYCA's domestic retrofit sales, slightly below Wakefield's wider share of WYCA's GDP (14.5%).

Retrofit sales made up 2.6% of Wakefield's GDP, in line with the average across WYCA, England, and the UK.

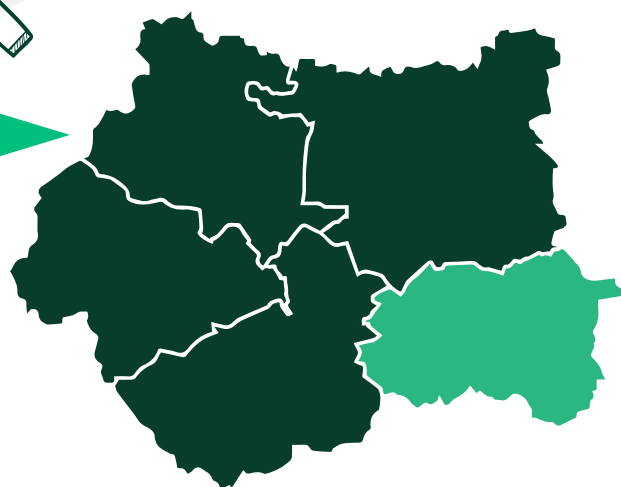
Seventeen key sub-sectors contributed 83% of total retrofit sales in 2022/23, led by:

- Roof/Loft Insulation (£57m; forecast to grow by 26% to £72m by 2024/25)
- External Cavity Wall Insulation (£22m; +18% forecast growth)
- Heat Pumps (£20m; +26% forecast growth)
- Other notable contributors included Plastering & Plasterboarding, Energy Management (with a 27% growth forecast), and Floor Insulation. Some sub-sectors, like Insulated Doors (+34%) and Roofing (+30%), are expected to see particularly strong growth.

Overall, Wakefield's retrofit sector shows a balanced mix of insulation, low-carbon heating, and broader energy efficiency improvements, reflecting a robust and steadily growing market.

LOCAL INSIGHTS

Wakefield's retrofit landscape is evolving rapidly. **Strom Limited**, based in Ossett, has entered the heat pump market with its first product – a clear signal of confidence in future demand. **Joule UK**, a manufacturer of renewables-enabling technologies such as solar thermal and efficient hot water cylinders, has defied sector-wide challenges, growing turnover to **£61.7 million** with pre-tax profits of **£1.5 million**. Green Economy clients **Ecospec Ltd** and **Purelec Energy** are scaling confidently in heat pump installation and solar/battery solutions respectively. **Vico Homes**, having secured over **£3 million** in funding, are delivering large-scale decarbonisation and insulation upgrades to over **1,300 properties**.



West Yorkshire Local Authority Sector comparators

WAKEFIELD

Figure 11: Wakefield and West Yorkshire Level 1 Measures for 2022/23

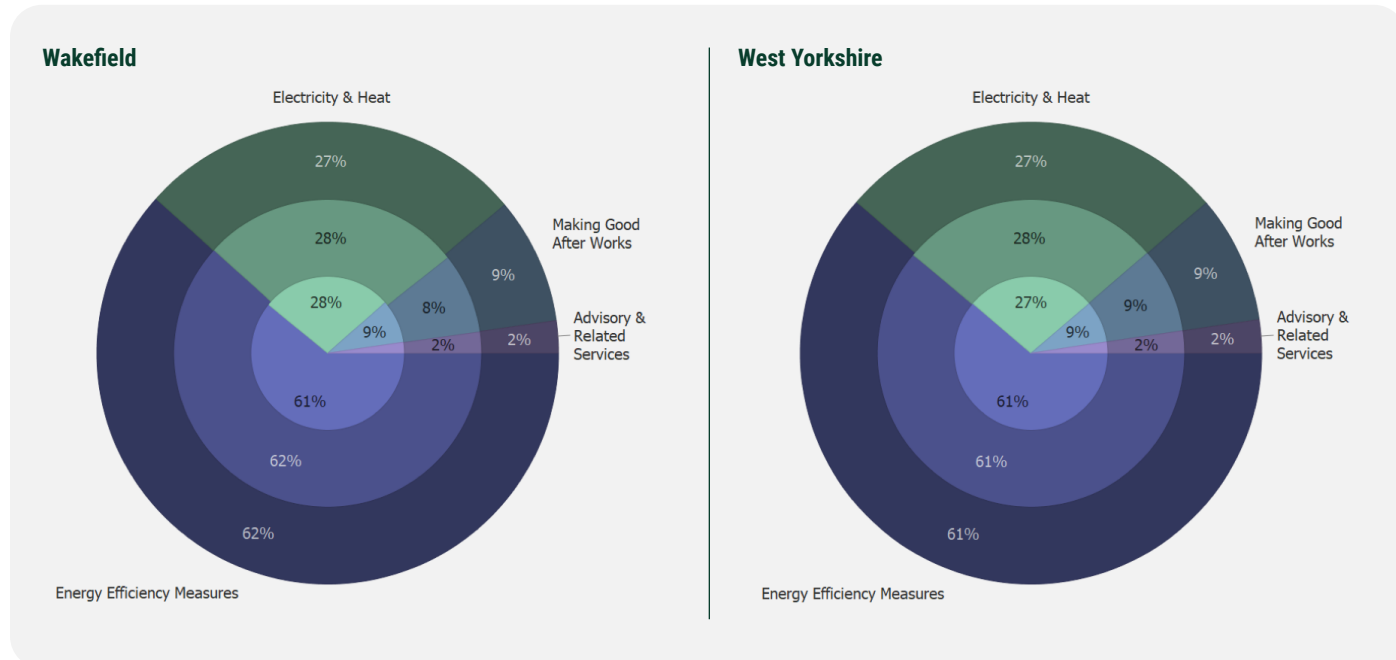
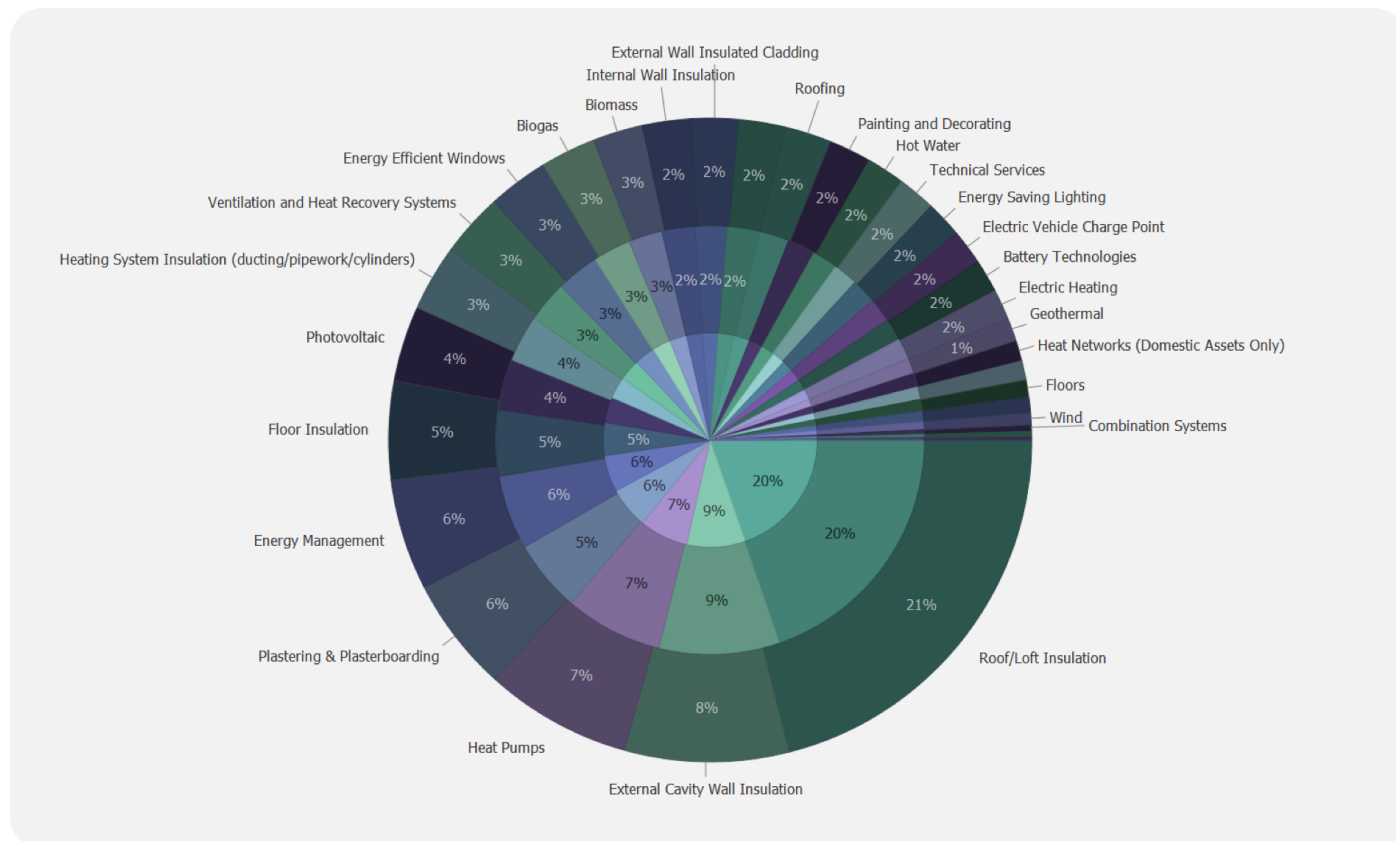


Figure 12: Wakefield's Level 2 and Selected Level 3 sub-sectors for 2022/23



STATUS UPDATE ON THE RETROFIT SECTOR BY LOCAL AUTHORITY

West Yorkshire Local Authority Sector comparators

Figure 1: WYCA's Local Authorities Sector Comparison

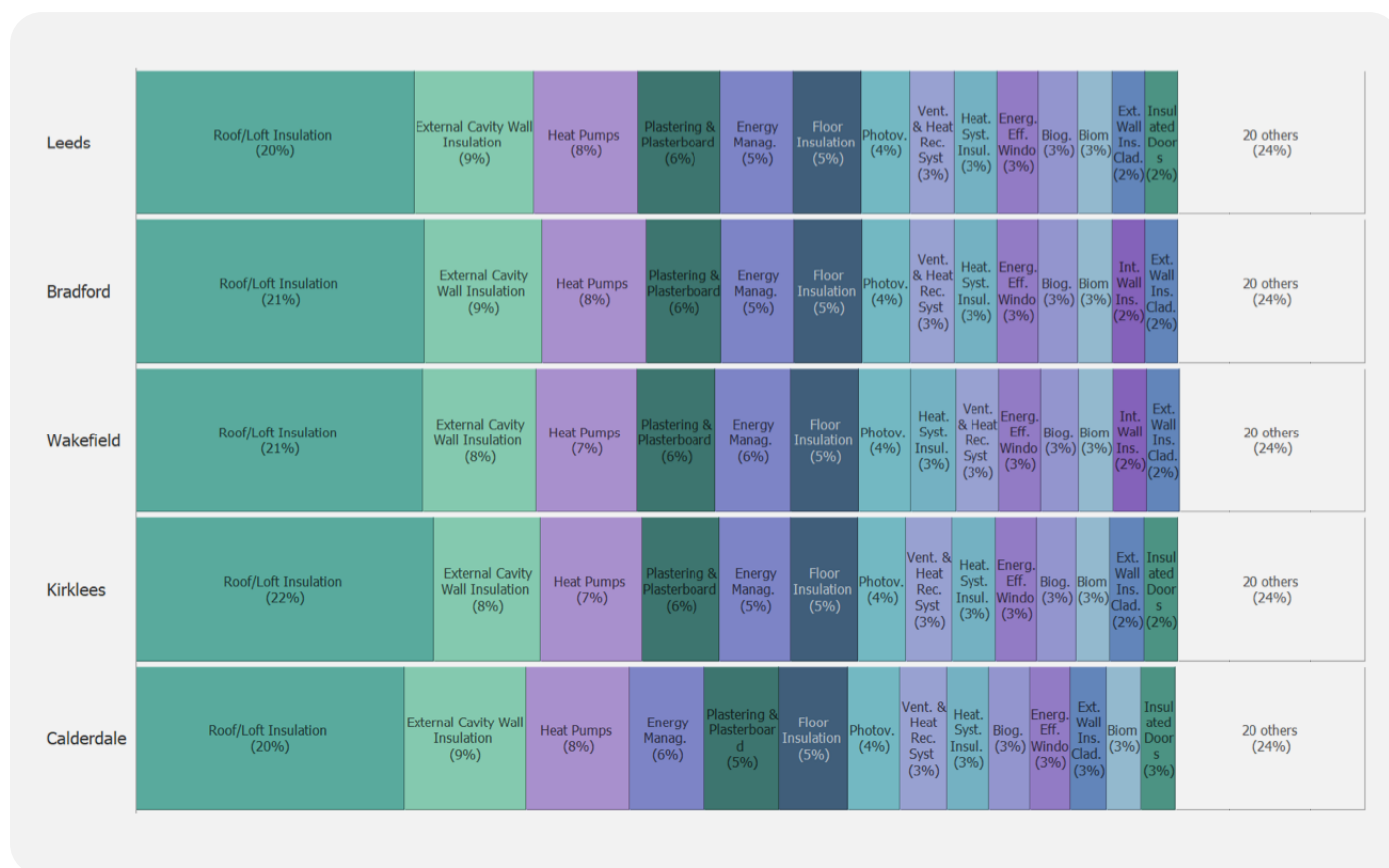


Figure 1 shows the share of the largest fourteen Level 2 and selected Level 3 sub-sectors across the five local authorities, highlighting local variation.

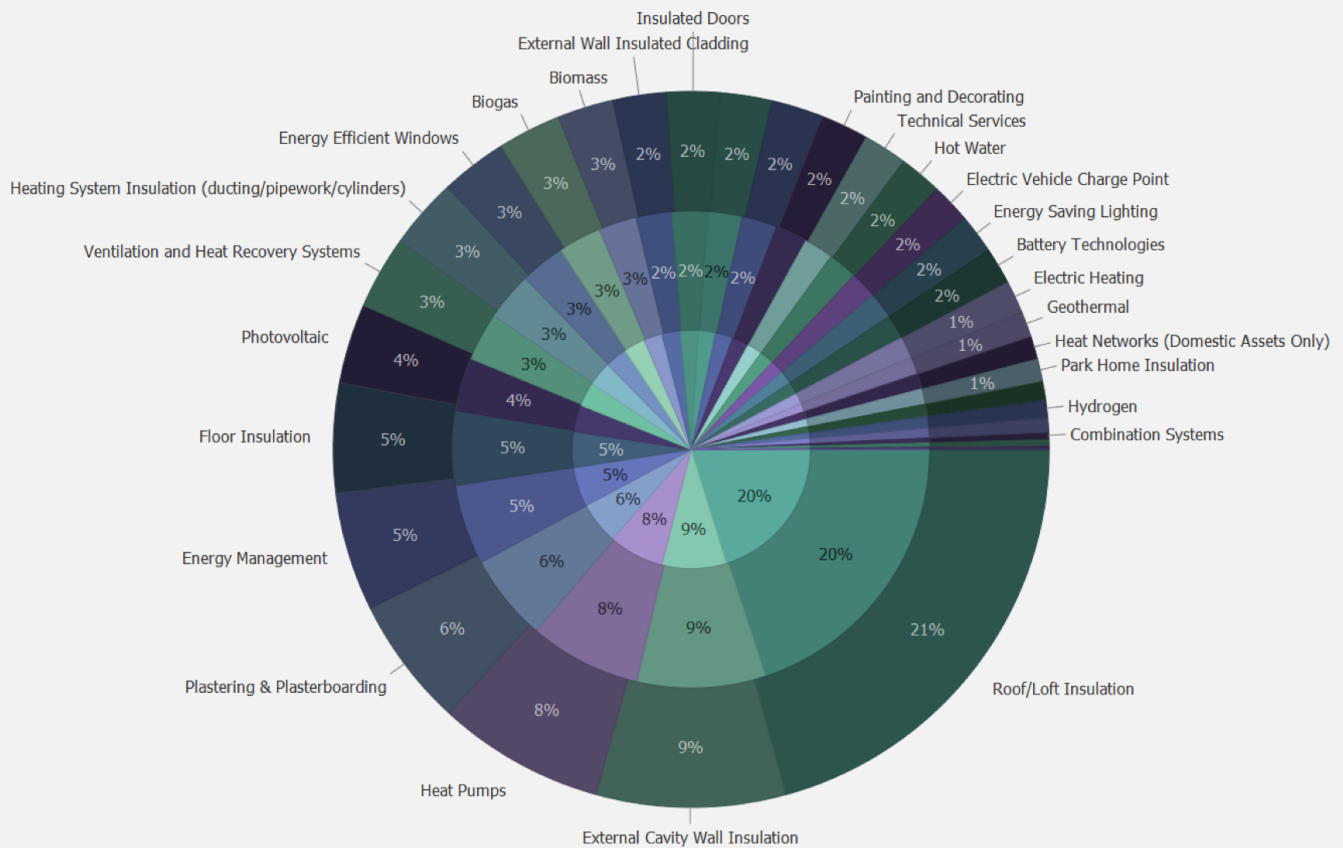
The same twelve key sub-sectors appear in each area, though proportions differ:

- Roof/Loft Insulation is the largest everywhere (20–22%)
- External Cavity Wall Insulation (8–9%)
- Heat Pumps (7–8%)
- Plastering & Plasterboarding and Energy Management (both around 5–6%)
- Other sub-sectors remain more consistent in proportion across local authorities.



West Yorkshire Local Authority Sector comparators

Figure 2: WYCA's Level 2 and Selected Level 3 sub-sectors for 2022/23



Conclusion

West Yorkshire's domestic retrofit sector is a vital and growing part of the regional economy, valued at £1.9 billion in 2022/23 and projected to grow by a further 26% by 2025/26. The sector's strong performance, diverse business base, and alignment with the UK's net-zero agenda position it as a regional strength and national asset.

Continued investment in workforce development, local supply chains, and innovation will be essential to sustain this growth and unlock further opportunities, particularly in high-demand areas such as energy efficiency measures and low-carbon technologies. With targeted support, the sector can drive economic resilience, create quality green jobs, and help achieve the region's decarbonisation ambitions.



Summary and Strategic Reflections

Our understanding of the retrofit sector in West Yorkshire is informed not only by accessing KMatrix data, but by ongoing dialogue with clients, regional businesses, and stakeholders we engage with. This

qualitative insight, combined with data analysis from KMatrix, confirms that the sector has faced considerable challenges over the past two years. Business closures and downsizing have been common as firms navigate volatile market conditions and adapt to evolving funding landscapes. The recent liquidation of a mid-sized installer with turnover in the £15–£20 million range is a stark reminder of the pressures facing the sector as business models shift and new schemes gain traction.

Despite these challenges, the businesses active today have demonstrated resilience and adaptability. They are well-positioned to drive forward retrofit delivery across the region, supported by a growing policy and funding environment.

Our analysis also highlights that most of the retrofit activity in West Yorkshire is delivered by SMEs, sole traders, and subcontractors – many of whom are difficult to quantify in terms of individual economic contribution. While this may not be surprising, it is important to recognise the increasing cross-skilling taking place among tradespeople. Many are expanding their capabilities into ventilation, plumbing, joinery, plastering, solar and battery installation, and low-carbon heating – often facilitated through our support and partnerships. This flexibility is enabling businesses to broaden their service offerings and respond more effectively to market demand.

Additionally, there are businesses and sole traders operating within West Yorkshire's retrofit market who are based outside the region but contribute meaningfully to the local supply chain and delivery capacity.

The announcement in July of a **£70 million funding boost for West Yorkshire homes**, made by Mayor Tracy Brabin and Minister for Energy Consumers Miatta Fahnbulleh, further reinforces the strategic importance of retrofit in the region's green economy transition.



Innovation and R&D

Innovation and R&D investment in the retrofit sector currently sits at around **4%**, slightly below the cross-sector average of 5%. This reflects the maturity of the sector in terms of materials and core technologies, where solutions are relatively well-established. However, there remains significant scope for innovation in **delivery models, service design, and quality assurance** – particularly in scaling retrofit activity while maintaining high standards and integrating the latest knowledge and best practice.

Innovation is also emerging in response to logistical challenges and the need for flexible, responsive approaches to project delivery. Most of the innovation we are seeing is focused on improving the **efficacy of existing products**, developing **new application methods**, and creating **services that fill market gaps**, rather than wholesale invention of new technologies.





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