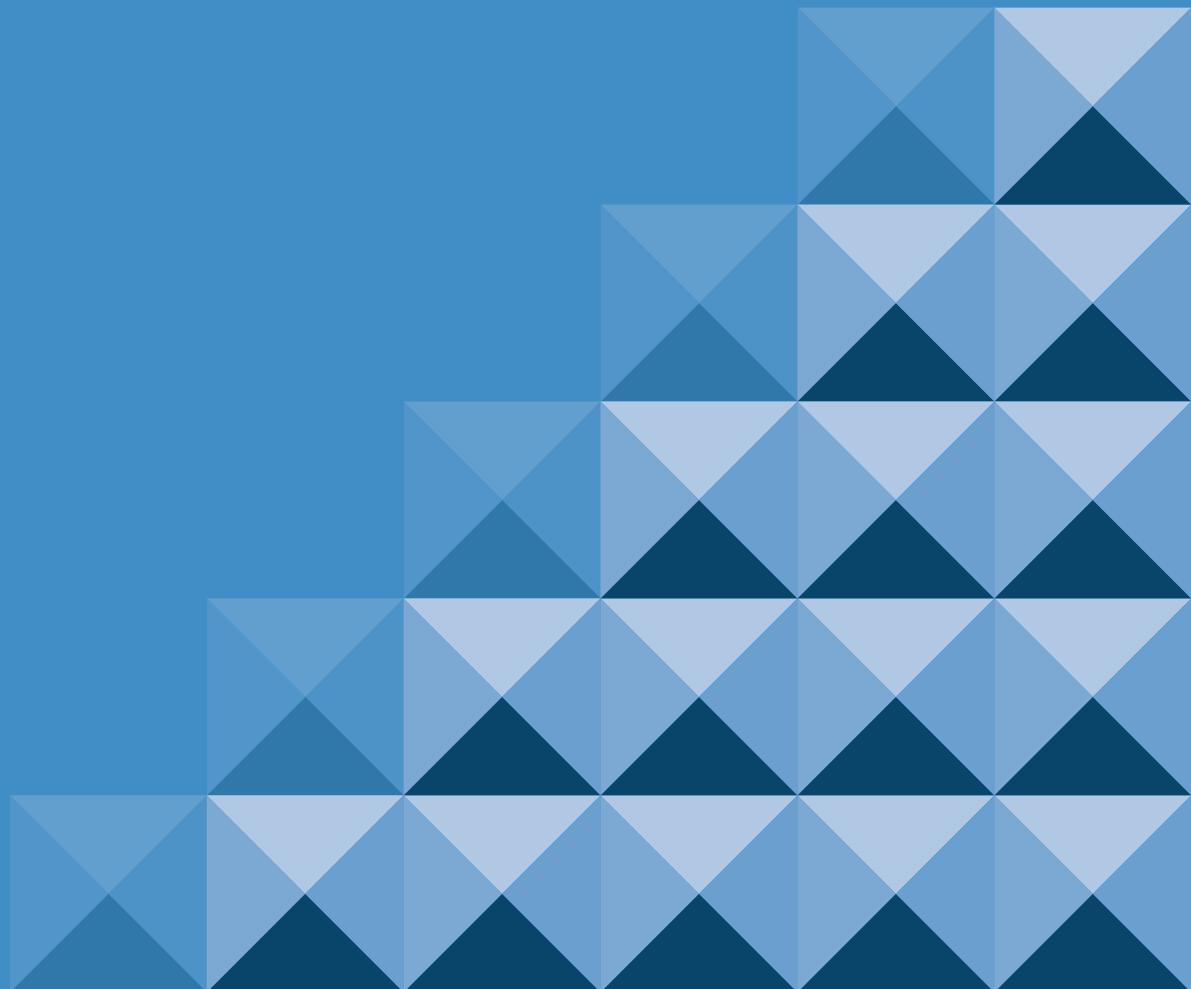


THE STATE OF WELLBEING IN UK MANUFACTURING



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FOREWORD

Manufacturing remains one of the most critical pillars of the UK economy. It supports millions of jobs, anchors regional economies, drives exports, and underpins national productivity and innovation.

Yet the sector is operating in an environment of sustained pressure. Businesses face ongoing cost challenges, economic uncertainty, and political instability, alongside geopolitical tensions and global trade volatility that continue to reshape markets and supply chains.

Central to the sector's ability to succeed in this environment is its people. However, workforce capacity remains a significant constraint. The manufacturing sector is currently facing around 50,000 long-term vacancies, contributing to an estimated £6 billion in lost output each year. Retention challenges continue to place pressure on skills pipelines, productivity, and operational continuity. Attracting and keeping talent is no longer simply a recruitment issue - it is a strategic risk to growth, competitiveness, and resilience.

In this context, workplace wellbeing is becoming a critical enabler of organisational performance. Robust wellbeing systems support not only the attraction and retention of talent, but also engagement, productivity, and long-term workforce sustainability.

This is reinforced by national evidence.

Data from the Health and Safety Executive (HSE) consistently shows an improvement in workplace safety, but health related stats are not going the same direction. Work-related stress, anxiety, depression, musculoskeletal disorders, and long-term ill health remain among the leading causes of sickness absence and lost working days across the UK workforce, highlighting the growing intersection between health, wellbeing, and organisational performance.

HSE STATS, 2024/25



1.9 MILLION

workers suffering from work-related ill health in 2024/25, up 200,000 from the previous year. All increases were in stress, depression, and anxiety.



52%

of reported work-related ill health was categorised as stress, depression & anxiety in 2024/25, compared with 46% the previous year.



730,000

were new cases in the year, up from 609,000 the previous year.



35.7 MILLION

days lost due to work-related ill health in the year, compared to 29.6 the previous year.



£16.4 BILLION

annual cost of work-related ill health in 2024/25, up from £14.5 billion the previous year compared to £6.5 billion annual cost for safety, down from £7.1 billion.

MAYFIELD REVIEW STATS



MORE THAN 1 IN 5

working-age people are currently economically inactive, with ill-health a major driver.



The state faces an estimated

£212 BILLION

annual bill from health-related inactivity (lost output, welfare, NHS demand).



Absence rates are at a

15-YEAR HIGH



SINCE 2019

about 800,000 more people have left work due to health and, without change, another 600,000 could follow by 2030.



EMPLOYERS

see high sickness absence costs and disruption.

This wider challenge is also reflected in Keep Britain Working, an independent review led by Sir Charlie Mayfield, known as the Mayfield Review, which frames workplace health and wellbeing as a national economic issue.

The review identifies long-term ill health as a key driver of economic inactivity and argues for a shift towards preventative, inclusive, and proactive workplace health models, positioning wellbeing as essential to workforce participation, productivity, and economic resilience. It argues that ill-health and disability are now central to the UK's participation challenge and that fixing this needs a new deal: employers leading on prevention and support, employees taking responsibility, and government enabling with policy, data, and incentives.

Against this backdrop, Make UK exists to support manufacturers through change, challenge, and transformation. Understanding the real state of wellbeing within manufacturing is therefore a strategic necessity.

Research conducted and presented within this report aims to provide clarity on current wellbeing conditions across the sector, giving those operating in manufacturing a clearer, evidence-based picture of where they stand and, crucially, insight into the actions needed to build healthier, more resilient, and more sustainable workplaces for the future.

EXECUTIVE SUMMARY

New research - commissioned by Make UK and conducted anonymously and independently with senior decision makers and shopfloor employees across the manufacturing sector - reveals a sector that has built strong foundations but now needs to turn those foundations into something tangible, consistent and felt by its people.

The data highlights three interconnected truths.

1. There is a clear perception gap between leaders and the shopfloor. Leaders believe they are taking proactive steps on health and safety, yet many employees experience something different on the ground. This divergence reflects a communication and visibility challenge. This perception gap presents a clear opportunity for the sector.
2. Manufacturers have activity in place - policies, procedures, risk assessments and training - but these are not consistently understood or experienced. Wellbeing policies exist, but many employees do not know what they include. Risk assessments are carried out, but not everyone sees the implementation. Training is common for physical health, but less so for psychological health. The result is a system that looks robust on paper but doesn't always translate into clarity or confidence on the ground.

3. The human impact is real. Many employees report mixed or worsening wellbeing, and they are clear about the consequences: lower morale, reduced productivity, and increased absence. Crucially, they believe that better wellbeing support would improve their performance and attendance. The appetite for change is real and shared across the workforce.

This report shows a sector that has already done much of the hard work. The findings offer a powerful mandate for action - now is the time to make wellbeing tangible, measurable, and meaningful. By closing the perception gap, strengthening communication and elevating wellbeing to the same level as safety and physical health, manufacturers can unlock better performance, stronger engagement, and healthier workplaces.

Wellbeing at work – “*fulfilment of the physical, mental, social and cognitive needs and expectations of a worker related to their work.*”

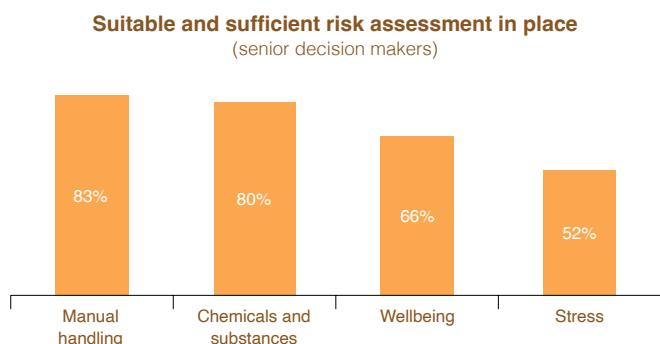
ISO 45003:2021 (Occupational health and safety management – Psychological health and safety at work – Guidelines for managing psychosocial risks



KEY SURVEY FINDINGS

Make UK conducted two independent, anonymous surveys:

- Between 8-13 January - 250 senior decision makers in the UK manufacturing industry
- Between 8-14 January - 200 adults working in the UK manufacturing industry on the shopfloor



According to **senior decision makers**:



The top 3 reasons for a decline in employee wellbeing are:



MIND THE GAP: LEADERSHIP INTENT AND EMPLOYEE EXPERIENCE DIVERGE

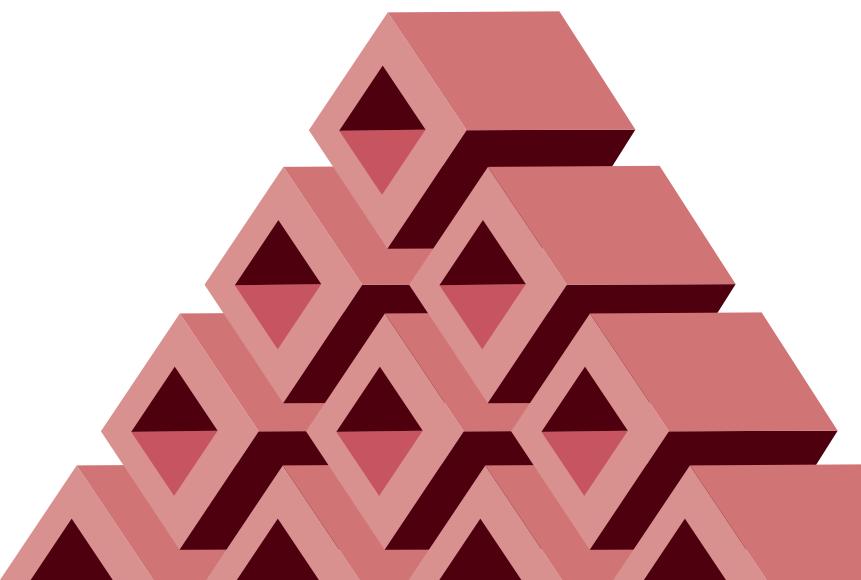
One of the clearest findings from the research is the difference between how senior decision makers believe they are performing on health and wellbeing, and how employees experience that performance day to day. In reality, leaders are taking action but much of that action is not visible, not understood, or not felt by the people it is intended to support.

Across the senior decision makers survey, leaders express confidence that their organisations are leading the way on both safety and health. Many believe their boards are proactive, engaged and setting the tone from the top. This reflects genuine intent: leaders see wellbeing as important, and they believe they are investing time, resource and attention into it.

Yet the shopfloor perspective tells a different story. Employees overwhelmingly describe their organisations as reactive rather than proactive, particularly on health and wellbeing. They report that issues are often addressed only once they arise, rather than anticipated and prevented.

This divergence matters. When leaders believe they are leading, but employees feel they are responding, trust and confidence begin to erode. It becomes harder for wellbeing initiatives to land, harder for communication to resonate, and harder for organisations to build a culture where people feel supported rather than managed.

The gap is not about bad leadership or disengaged employees. It is about visibility, communication, and consistency. Leaders are doing more than employees can see and employees are experiencing less than leaders realise. Closing this gap is essential if the sector is to move beyond compliance and into a culture where wellbeing is understood and shared.

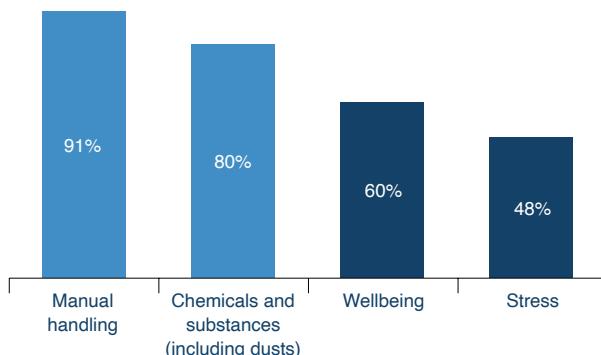


FROM PAPER TO PRACTICE: TURNING SYSTEMS INTO EXPERIENCE

On paper, the sector has built a strong framework for managing health, safety and wellbeing. To a large extent, policies exist, risk assessments are carried out, training is delivered, procedures are in place.

But the research also shows that activity alone does not guarantee impact. Many of these systems are not consistently understood, communicated or experienced by the people they are designed to support. And crucially, there is a noticeable imbalance between how well physical health is embedded and how psychological health, such as wellbeing and stress, is treated.

Suitable and sufficient risk assessment in place



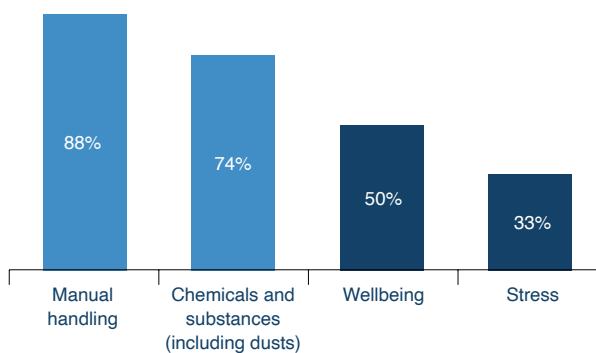
Across both surveys, physical health emerges as the area with the strongest structures and highest confidence. Risk assessments for physical hazards are well recognised, and training, aimed at hazards like manual handling, is widespread. In short, employees are far more likely to know that processes exist and to feel that action is taken when physical health issues arise.

"The number of fatalities in UK workplaces has fallen consistently since the introduction of the Health and Safety at Work etc. Act in 1974, establishing the UK as a global leader in workplace health and safety. This is a significant and hard-won achievement. However, while fatalities remain an important indicator, an over-reliance on them can risk masking wider issues. The data suggests that trends in wellbeing and long-term ill health are worsening with the size of the problem growing, not shrinking. This demands a more rounded approach to workforce health."

Chris Newson, Environment, Health and Safety Director at Make UK

Psychological health, such as wellbeing, stress, and mental health, does not receive the same level of clarity or consistency. Leaders report that policies include stress and general wellbeing, yet a significant proportion of employees either do not know what these policies cover or are unaware they exist at all. While risk assessments for physical hazards are almost universally acknowledged, awareness of assessments for stress and wider wellbeing is far lower. The same pattern appears in training: training for physical health (chemicals, manual handling, etc.) is common, but wellbeing-related training is patchier and less visible.

Have you received training in?

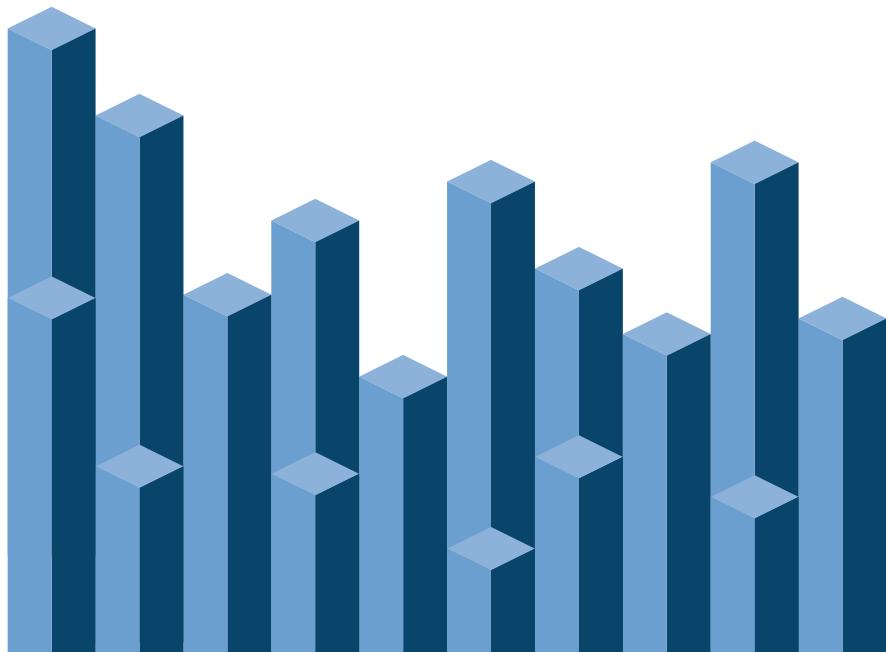


The Mayfield Review (*Keep Britain Working*) suggests that this discrepancy stems from a perceived lack of competence. Safety feels technical, structured, and rule based. Wellbeing feels personal, emotional, and unpredictable.

In manufacturing, this plays out in a very particular way. The sector has decades of experience embedding safety. Checking a machine guard, reviewing a lifting technique, or completing a risk assessment for physical hazards feels familiar, structured and within our competence. By comparison, asking someone about their wellbeing can feel intrusive and the thought of responding can be daunting. This is the “culture of fear” the Mayfield Review describes: a hesitation rooted not in apathy but in perceived incompetence. The belief that wellbeing is the domain of experts, clinicians or HR professionals and not something operational leaders can or should touch. And yet, the data shows that employees want exactly this: human connection, visible care, and a sense that their wellbeing matters as much as their safety and physical health.

This matters because it shapes how employees interpret their organisation's priorities. When safety and physical health feels structured and proactive, but wellbeing feels less defined or less consistently acted upon, it reinforces the perception that wellbeing isn't as important.

The sector has already done much of the groundwork. The systems are there. The opportunity now is to make them meaningful: to ensure that policies are understood, that risk assessments lead to visible action, and that wellbeing is treated with the same rigour, clarity, and seriousness as physical health.



WELLBEING THAT WORKS: WHAT EMPLOYEES SAY WOULD MAKE A DIFFERENCE

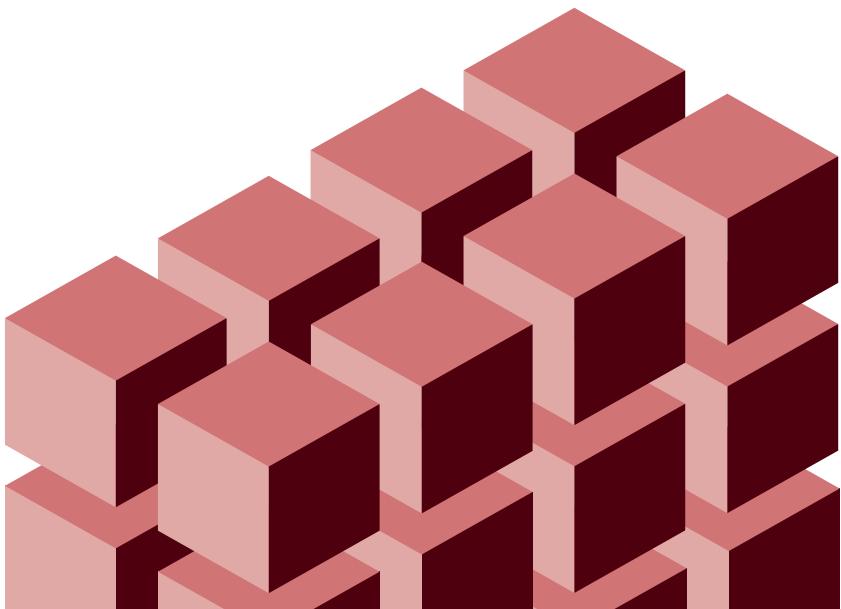
Across the survey, employees consistently link improved wellbeing provision with better morale, higher productivity, and reduced absence. When wellbeing improves, people feel more motivated, more able to focus, and more confident in their roles. When it declines, the effects are immediate: stress rises, engagement drops, and performance suffers.

Employees also identify the factors that help them feel better at work. These include supportive line management, clearer communication, manageable workloads and a sense that their organisation genuinely cares about their wellbeing. At the same time, the data shows that many of the things that harm wellbeing are preventable. Poor communication, inconsistent leadership behaviours, and a lack of clarity around support all contribute to a sense of uncertainty and pressure. These are areas where organisations can make meaningful improvements.

"Now more than ever, organisational resilience depends on managers being equipped with the soft skills to foster wellbeing and psychological safety, creating the conditions for open dialogue and proactive prevention, rather than reactive responses to absence"

Jenny Rimell, Head of HR Consultancy and Training at Make UK

The opportunity for manufacturers is clear. By listening to what employees say would help, and by acting on it, organisations can create workplaces where people feel valued, supported, and able to thrive.



WHAT NEXT?

The findings within this report show a sector that has the foundations for strong wellbeing but now needs to make those foundations tangible and lived.

Across both audiences, three findings stand out:

1. There is a significant perception gap - leaders believe they are proactive on health and wellbeing, while many employees experience something far more reactive.
2. Activity exists but isn't consistently understood - policies, risk assessments, and training are in place, yet wellbeing lags behind safety and physical health in visibility, clarity, and confidence.
3. The human impact is real - employees link better wellbeing support directly to improved morale, productivity, and attendance.

Why now?

Work-related ill health is rising sharply, driven by stress, depression, and anxiety. Millions of days are being lost, and the cost to UK business continues to climb.

Approximately 25% of the annual cost of workplace ill-health (£16.4 billion in 2024/25, up from £14.5 billion the previous year) falls on employers.¹ Costs include claims, prosecutions, sick-pay and replacement labour or overtime amongst other things.

**APPROXIMATELY 25% OF THE ANNUAL COST OF
WORKPLACE ILL-HEALTH
(£16.4 billion in 2024/25, up from £14.5 billion the previous year)
FALLS ON EMPLOYERS**

These stark figures have resulted in increasing scrutiny from the UK Government and the HSE.

The Government commissioned Mayfield Review highlighted the need for a more confident, prevention driven approach to wellbeing. The Healthy Working Lifecycle including the stay-in-work plans and return-to-work plans recommended in the review have been accepted, are in progress and will be in place by the end of the year.

The HSE has targeted national campaigns and stronger expectations around preventing long-term ill health. They've also publicly stated that they're committed to focusing proactive inspections entirely on health in 2026.

At the same time, international standards such as ISO 45003 are setting clear expectations for managing psychological health with the same rigour as physical safety.

The evidence in this survey, and other research conducted, tells us that stronger wellbeing support helps employees feel better and work more productively. Firms investing in health and wellbeing initiatives link such investment to improved retention and reduced sickness absence.

Acting now strengthens productivity, retention and reinforces manufacturing's commitment to its people, supporting recruitment aims within the sector.

¹According to the Health & Safety Executive's annual cost estimates

A sector moving forward

As the national voice for UK manufacturing, Make UK has long championed the belief that great businesses are built on great people. Every year, through the Make UK Manufacturing Awards, we celebrate talent, innovation, and business achievement in manufacturing.

The 2026 award winner for Health, Safety and Wellbeing was Evtec Automotive. The judges praised the organisation for a values-driven approach that puts wellbeing, safety and inclusivity at its core. The result being that the organisation has seen a vast improvement in cost savings with higher productivity, a 31% reduction in reported accidents, and a significant reduction in absence.

“With bold leadership and deep workforce engagement, Evtec Automotive has transformed culture and systems, boosted reporting, reduced incidents, and strengthened staff retention. By creating a culture of psychological safety, they have set a powerful industry standard - proving that empowered people drive exceptional performance.”

Make UK National Manufacturing Awards
- Judges comment on Evtec Automotive

This is the kind of example the sector can be proud of. It demonstrates that wellbeing is not a “nice to have” or an add-on, it is a strategic advantage. It improves morale, strengthens loyalty, and helps manufacturers attract and retain the talent they need for the future. The opportunity now is for more organisations to follow this path.

**IF EVERY EMPLOYER
IMPLEMENTED IT CONSISTENTLY,
EFFECTIVE WELLBEING SUPPORT
WOULD COST AROUND
£60 PER EMPLOYEE PER YEAR²**

**GETTING IT WRONG COSTS
UK EMPLOYERS AROUND
£1,500 PER EMPLOYEE PER YEAR³**

What manufacturers need to do

- Make wellbeing visible and felt - ensure employees know what support exists and can see it in action.
- Close the perception gap - increase communication, make implementation visible, and leadership more present so intent matches experience.
- Give wellbeing the same rigour as safety and physical health - apply structured processes, clear responsibilities, and consistent training to stress and mental health.
- Communicate clearly and consistently - move wellbeing out of documents and into everyday conversations.
- Focus on impact, not activity - measure how people feel, not just what policies exist.

²Keep Britain Working Technical Note published by the UK government

³Supported by Deloitte research showing £1,475–£2,277 per employee annually for poor mental health costs (aggregate of absence, presenteeism, turnover)



Make UK, The Manufacturers' Organisation, is the representative voice of UK manufacturing, with offices in London, every English region, and Wales. Collectively we represent 20,000 companies of all sizes, from start-ups to multinationals, across engineering, manufacturing, technology, and the wider industrial sector. Everything we do – from providing essential business support and training to championing manufacturing industry in the UK and internationally – is designed to help British manufacturers compete, innovate, and grow. From HR and employment law, health and safety to environmental and productivity improvement, our advice, expertise and influence enable businesses to remain safe, compliant, and future-focused.

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