



**MACH  
2026**

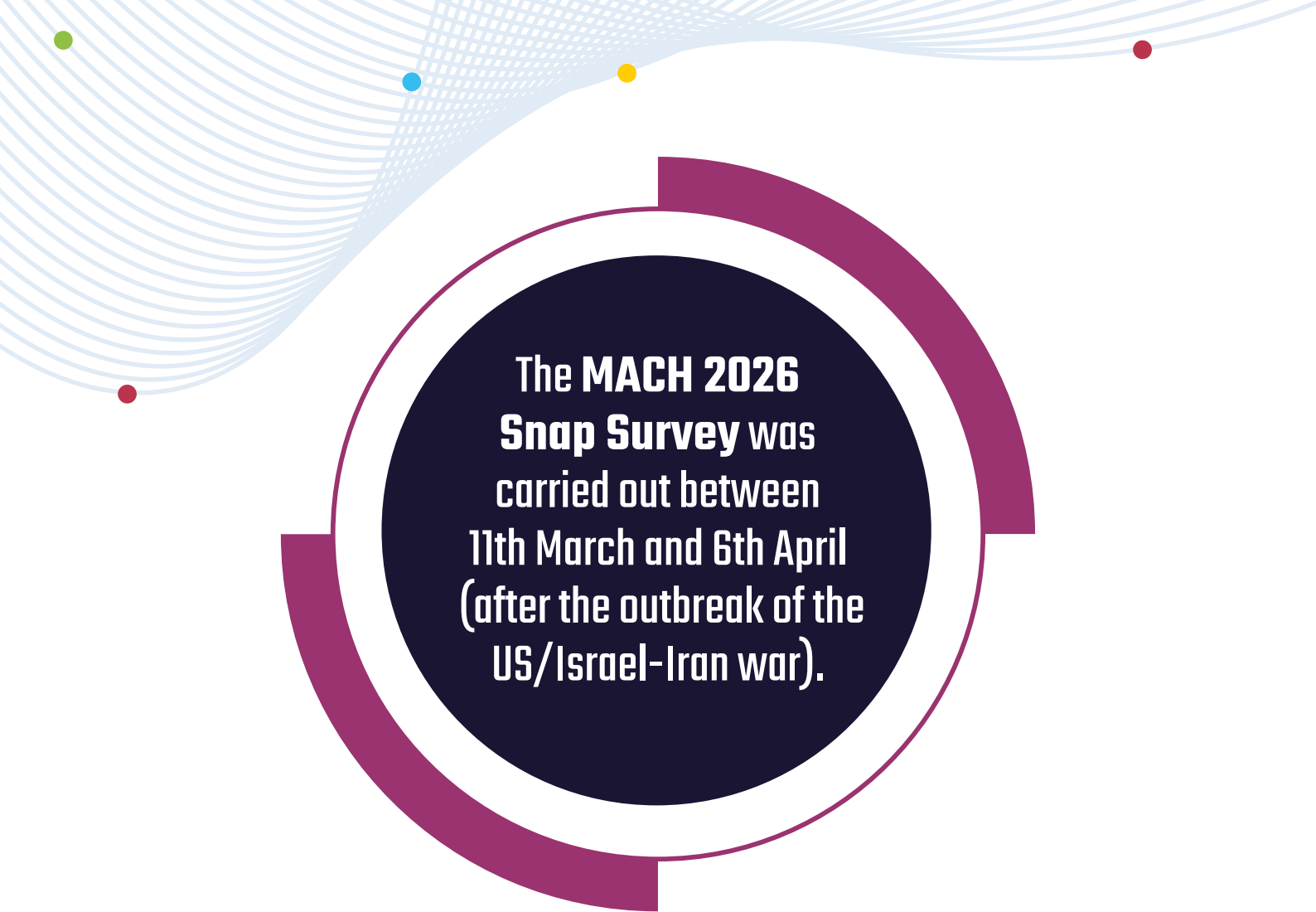
**Sovereign Capacity  
and Industrial  
Strategy**

**A SNAP SURVEY**

Organised by



**MACH  
2026**



The MACH 2026  
Snap Survey was  
carried out between  
11th March and 6th April  
(after the outbreak of the  
US/Israel-Iran war).

## MACH 2026 Snap Survey

The two purposes of the **MACH 2026 Snap Survey** were to establish the UK's ability to increase manufacturing activity to meet the needs of Sovereign Capability in key sectors like defence, energy and transport and to make an initial assessment of the impact of the government's Industrial Strategy.

Responses were received from **358 people**, after allowing for any duplicate responses.

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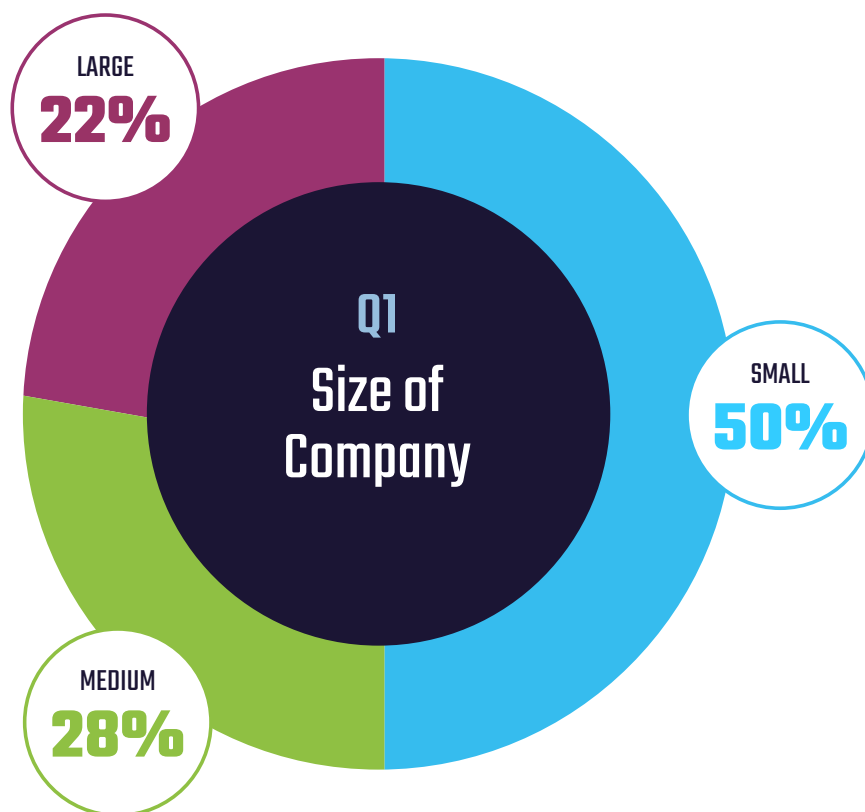
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## Size of Company

Half (50%) of the respondents were in small companies; 28% were in medium and 22% were in large companies.

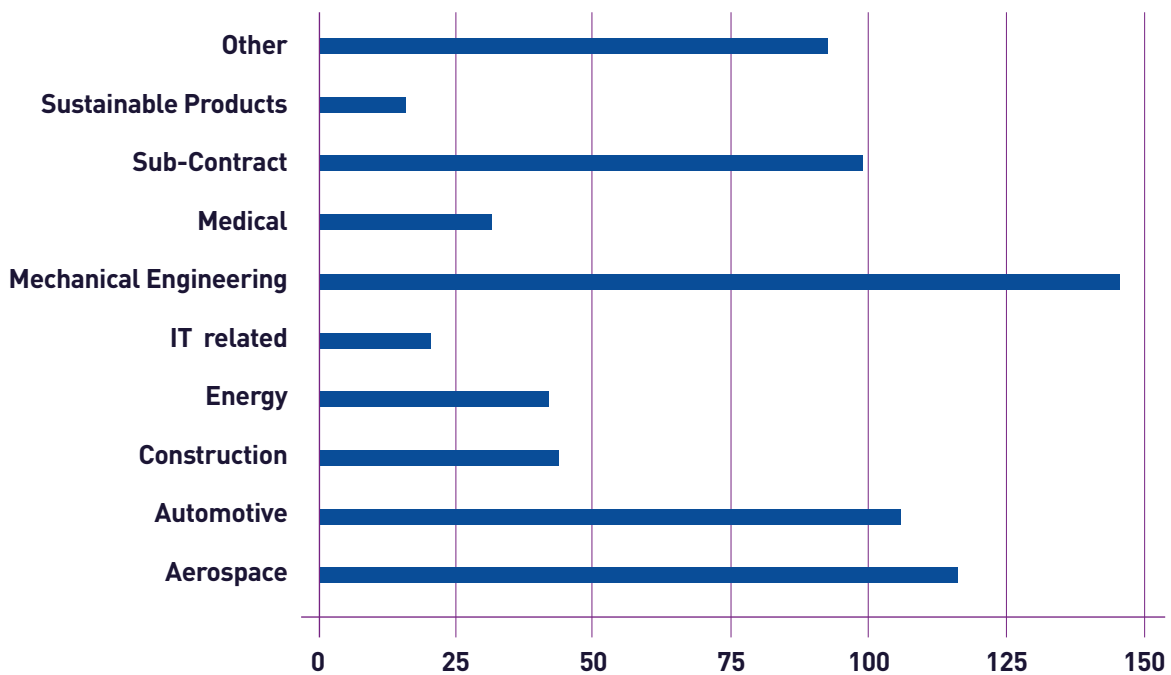
**Note** that although this is self-assessed and, therefore, may not exactly match other definitions, it reflects how the respondents perceive their company.



# Industries

The most common industries were Machinery (Mechanical Engineering), Aerospace, Automotive and Sub-Contract Manufacturing.

## Q2 Industries



There could be some overlap between the sectors, perhaps most notably with the “sub-contract” category; some companies who are sub-contractors wholly to one industry (for example, automotive or aerospace) might regard themselves as being in that industry rather than sub-contract (or vice versa).

There was a wide range of “other” industries specified, ranging from “3D Print Service Provider” to “Visual Inspection”; the only one to be given by more than ten separate respondents was “defence”.

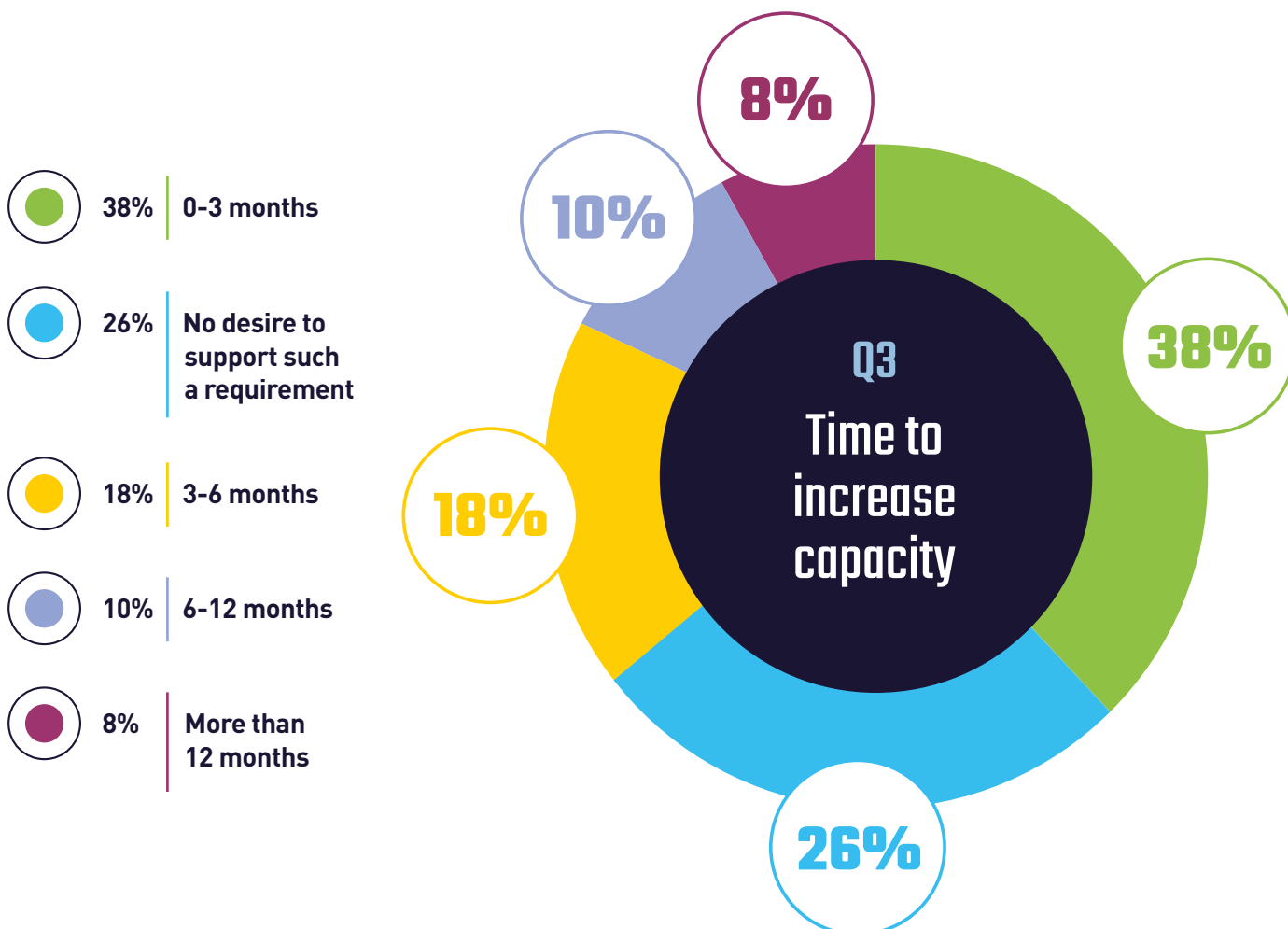
Multiple responses were allowed to this question, up to a maximum of three. There were 37 respondents who exceeded this count, including one who said that they were in nine of the ten options.



# How long would it take to increase capacity

Of those who could increase capacity, just over half said this could be done within 3 months and a further quarter could do so within 3-6 months.

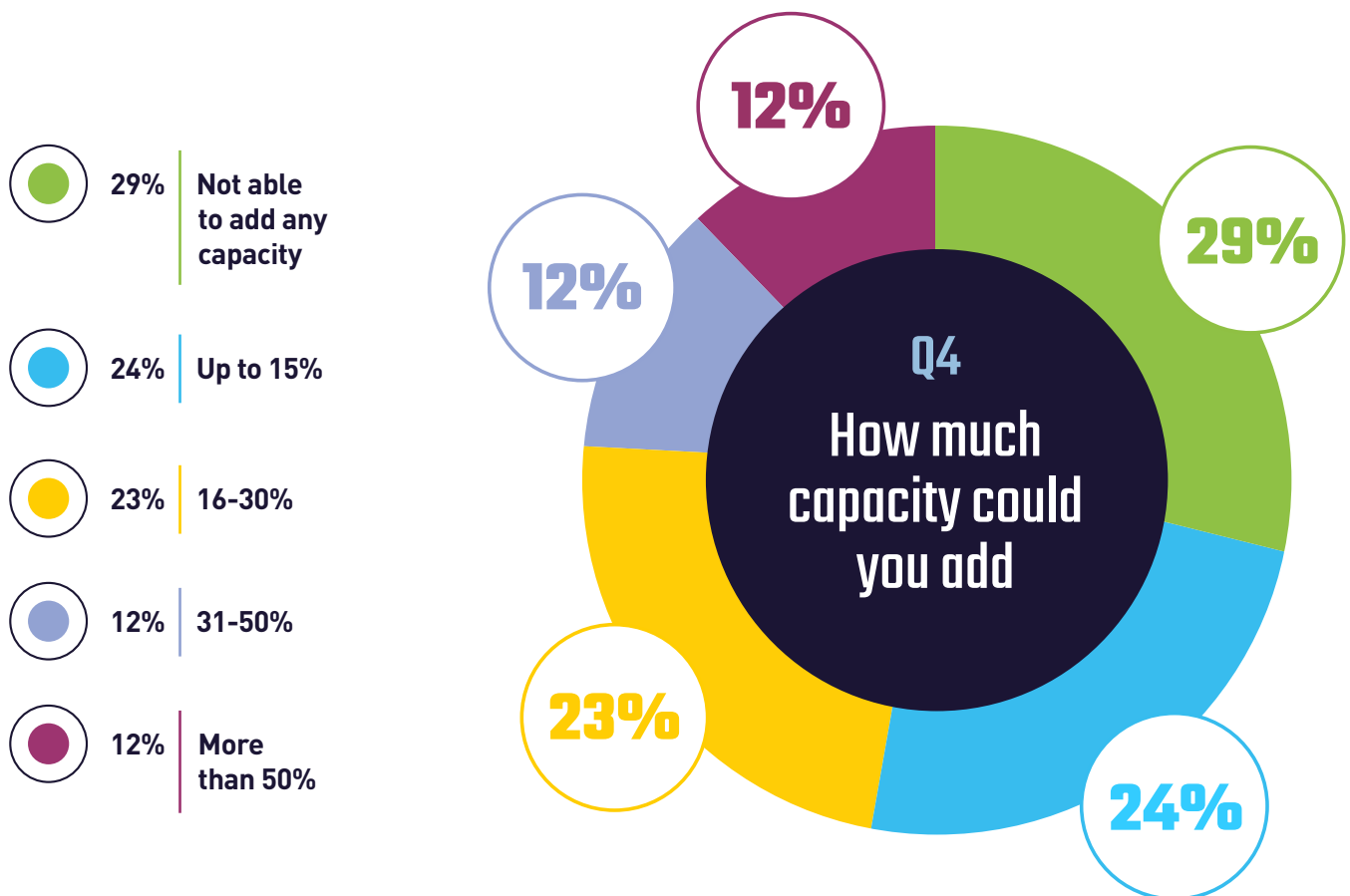
Just over a quarter (26%) of respondents said that they had “no desire to support a need to boost sovereign capability”.



# How much capacity could you add

When asked how much capacity could be added, 29% said that none could be added. Of the remainder, one-third said “up to 15%”, one-third said “16-30%” and one-third said “over 31%”; the latter category was split evenly between “31-50%” and “more than 50%”.

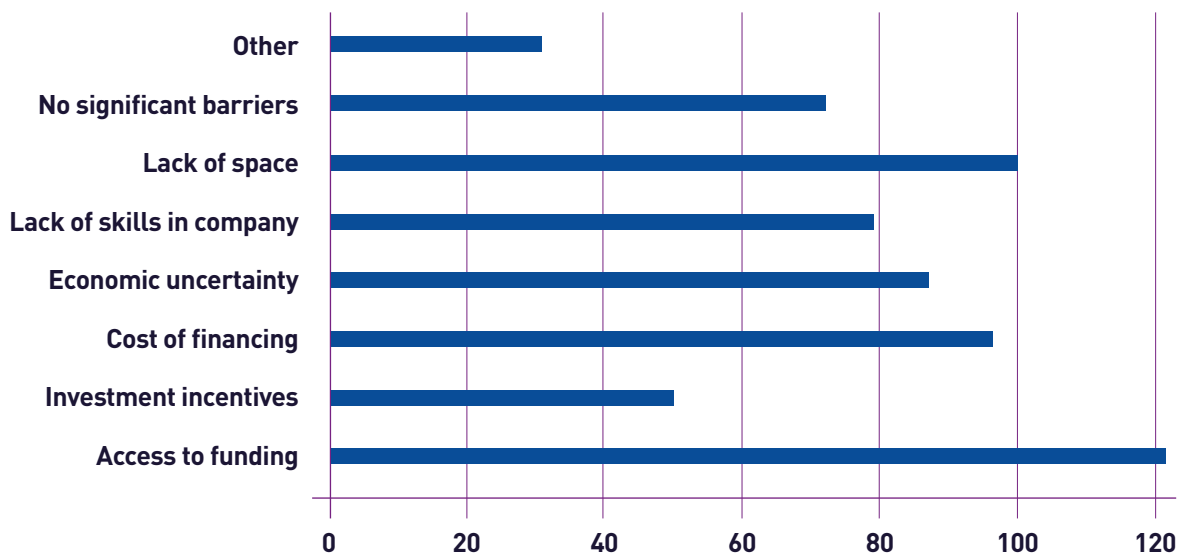
**Note** that there is some inconsistency between the results of this question and the previous one. Of the 93 respondents who said that they had “no desire to support a requirement to increase capacity to boost sovereign capability, 12% (11 respondents) indicated that they could “increase capacity to support sovereign capability”.



# What are the main barriers to increasing your capacity

The most reported barrier to expanding capacity was “access to funding” (34% of respondents); this was followed by “lack of space” (28%) and “cost of financing” (27%) and then “economic uncertainty (e.g. tariffs)” (24%) and “lack of skills in the company” (22%).

## Q5 Barriers to Increasing your Capacity



20% of respondents said that there were “no significant barriers to expanding capacity” – note that eight responses to this have been disallowed as they also gave other factors that were limiting capacity; if these are included, there were 22% of respondents to this heading.

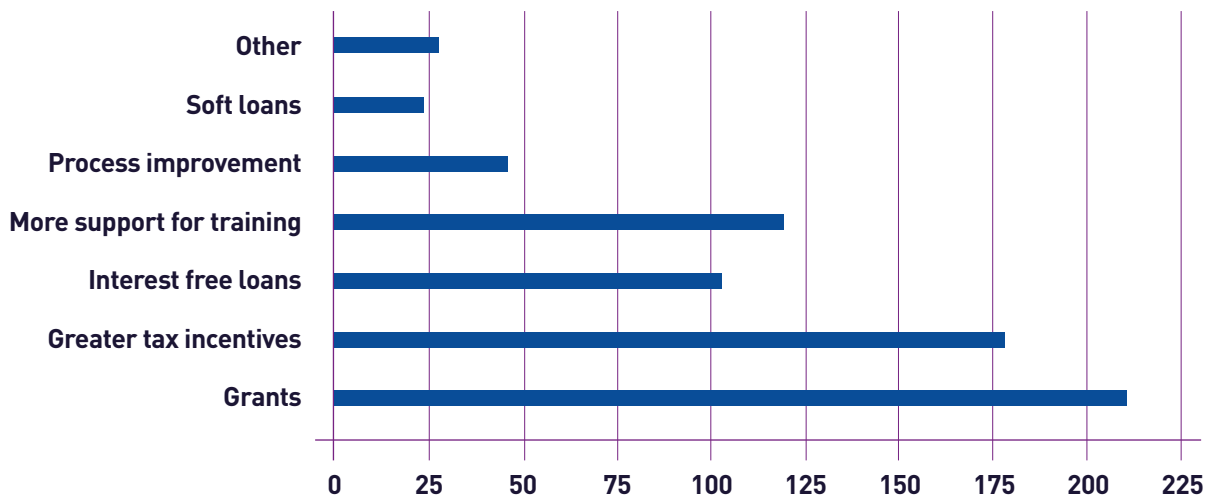
There were a range of “other” factors specified from “Already at sovereign capacity” to “workforce”; there were very few common responses, although variations around skills were given by six respondents.

Respondents were asked to give a maximum of three replies from eight options; some exceeded this limit, with thirteen giving four options and one selected five.

# How could government help you to increase your capacity

When asked “how could Government help you to increase your capacity”, the largest responses were “grants” (59%) and “greater tax incentives” (50%); the other two significant responses were “more support for training” (33%) and “interest free loans” (29%).

## Q6 Help to Expand Capacity



There was again a wide spread of responses in the “other” category, with no clear theme emerging; these ranged from “Allow development of more industrial property development; slash business rates” to “Tariffs reduction”.

Respondents were asked to give a maximum of three replies from seven options; 22 companies exceeded this limit, with two giving all seven options (including “other”, although one of these did not specify what the “other” suggestion was).

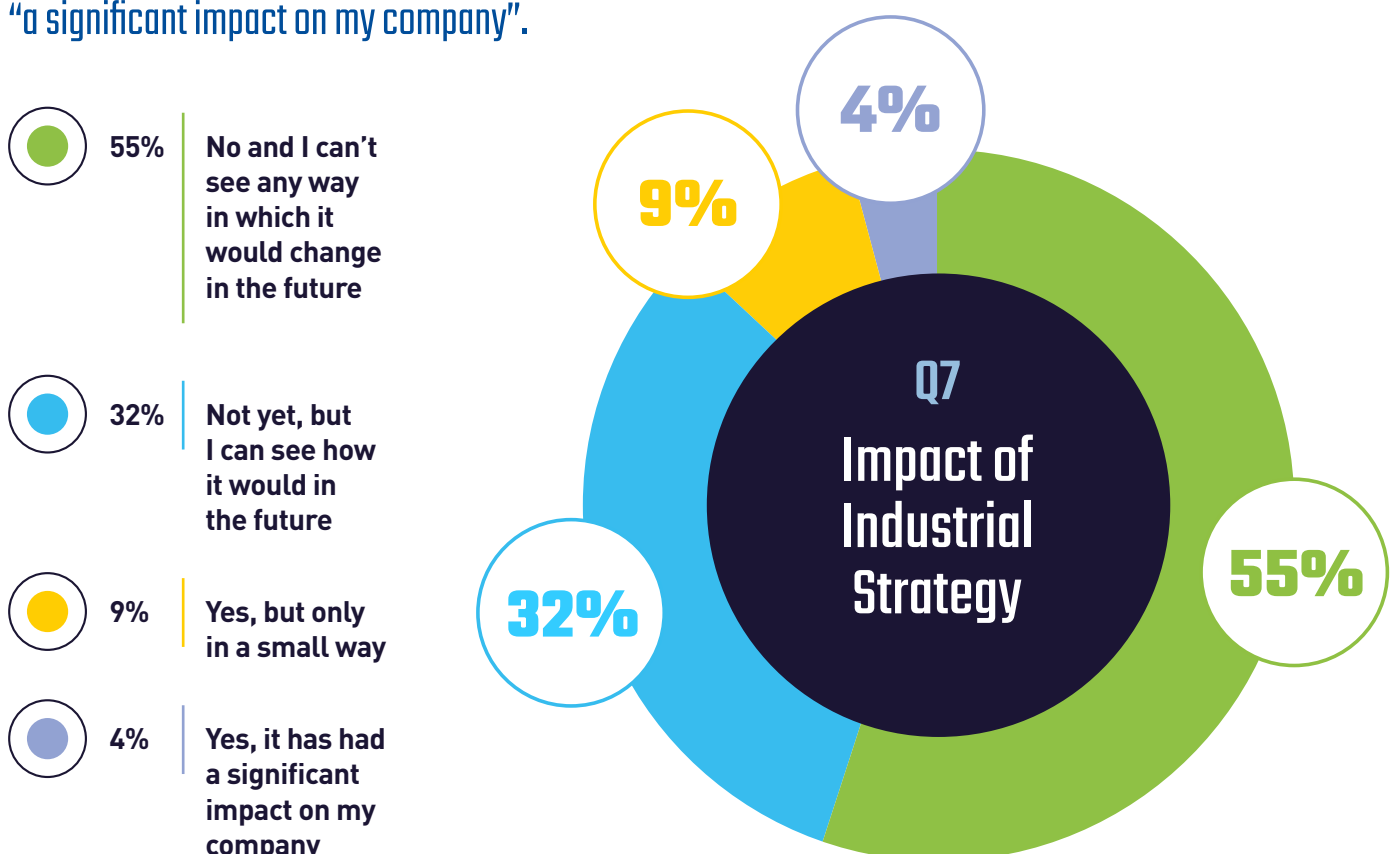


## What impact has the Industrial Strategy had on your company

Turning to the views on the Industrial Strategy, over half (54.7%) of respondents said that this has had no impact on their company and they could not “see any way in which it would in future”.

Another way of looking at this question is that nearly half of respondents (45.3%) said that either the Industrial Strategy had an impact on their company or could “see how it would in future”.

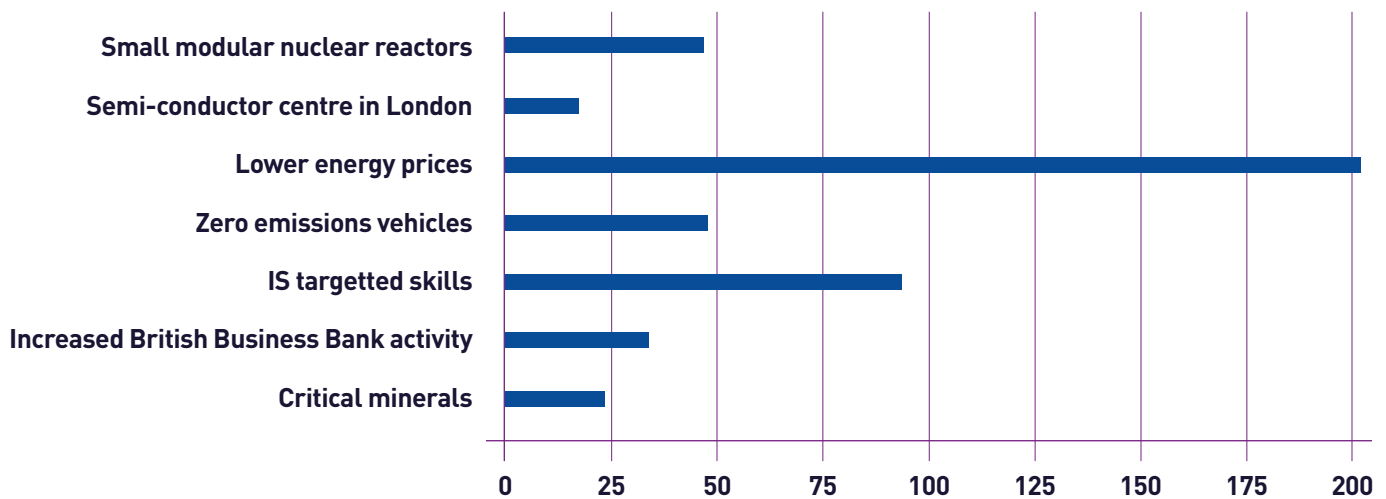
However, of these, the majority had not yet seen an impact but could see how it might in future; of the total response, 9.5% said that the impact had only been “small” while 3.6% said that it had “a significant impact on my company”.



# Which Industrial Strategy policies will benefit your company

When given a list of seven policies that the Government said it was implementing under the banner of the Industrial Strategy, 24% of respondents said that “none of the above would be of meaningful benefit to your company”.

## Q8 Beneficial policies from the Industrial Strategy



Of those highlighting any of the options, by far the most reported was “lower energy prices” (57% of respondents – this is equivalent to 75% of those respondents who said that at least one of the seven options would be of benefit). The next most reported factor was “Industrial Strategy targeted skills package” at 26% (34% if “none” is excluded). “Investment in zero emissions vehicles manufacturing through grants and R&D support” and “Support for Small Modular Nuclear Reactors” were both given by 13% (17%) of respondents.

Respondents were asked to give a maximum of three replies from seven options; 11 companies exceeded this limit – seven gave four options and two each gave five and six options.





## The Manufacturing Technologies Association (MTA)

The MTA exists to promote the interests, and be the voice of the manufacturing technologies sector in the UK.

The expanding scope of engineering-based manufacturing has seen the MTA broaden the range of its support to the sector with the formation of a new cluster of trade associations and events.

