



SOUTH EAST  
LOCAL ENTERPRISE  
PARTNERSHIP

## Key Indicators Report

# UK's Global Gateway

June 2022

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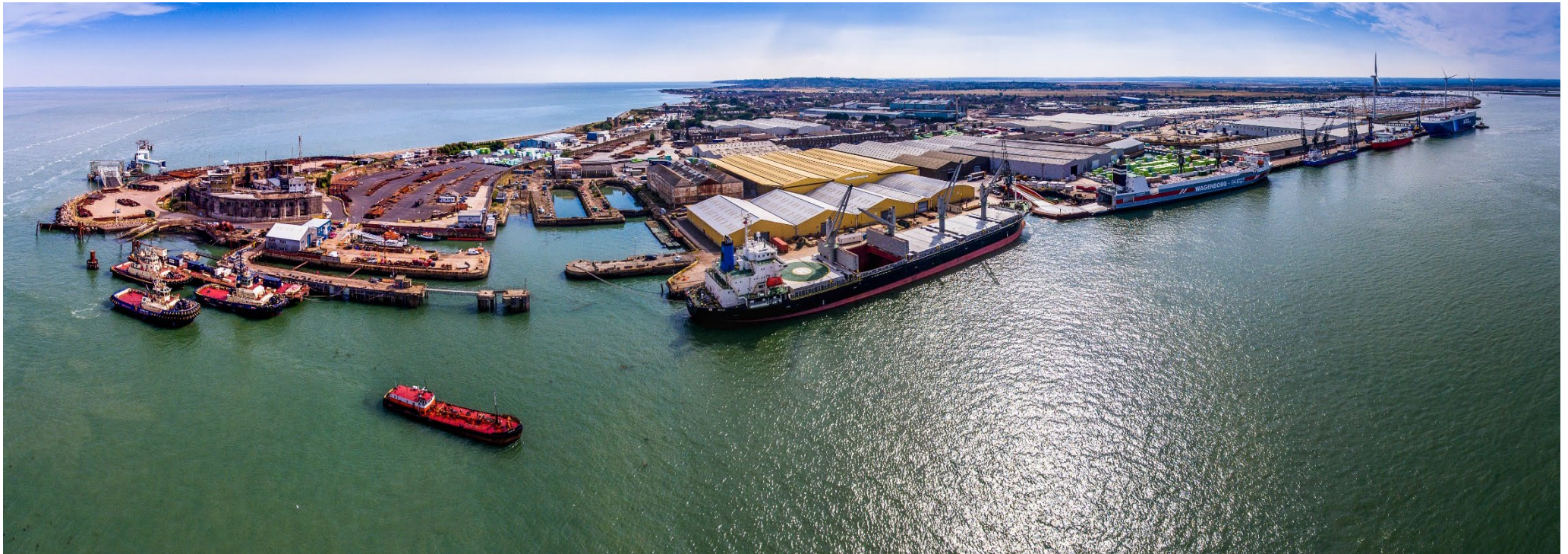
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# Headline Summary

- SELEP's export value of goods was 18% down in 2020 compared to 2019
- Non-EU trade was down more than EU trade with Machinery and Transport equipment exports down most
- Import tonnage through SELEP ports was fully recovered to pre-pandemic levels by quarter 3 of 2021
- Stansted now accounts for a higher share of UK air-freight tonnage having seen higher throughput during the pandemic, although throughput declined slightly in quarter 1 of 2022
- Port passenger numbers were lower throughout most of 2021 compared to 2020 and despite some recovery in late 2021 still remain more than 50% below pre-pandemic levels
- Airport passenger numbers, having reduced to near zero during lockdown periods picked up in late 2021 but were only at 54% of 2019 levels in quarter 1, 2022, with Stansted having recovered slightly more than UK airports overall

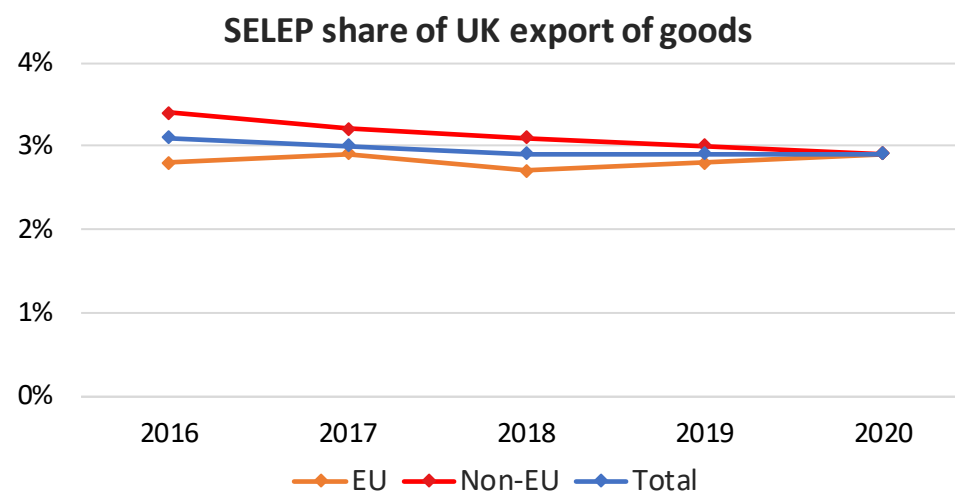


# Export Value of Goods

- Export trade value of goods for SELEP businesses in 2020 was 18% below 2019 export trade value, which compares to a 16% decline for the UK as a whole
- Non-EU trade declined the most at 21% (UK 18%) with EU trade only declining 13% (UK 15%)
- The decline in exports was more severe for Machinery and Transport Equipment, particularly for non-EU trade
- Food products exceptionally saw an increase in exports in 2020, driven by increased sales to the EU



	2016	2017	2018	2019	2020
EU £ mill	4,032	4,636	4,619	4,693	4,073
Non-EU £ mill	5,002	5,373	5,319	5,377	4,222
<b>Total</b>	<b>9,034</b>	<b>10,009</b>	<b>9,938</b>	<b>10,070</b>	<b>8,295</b>



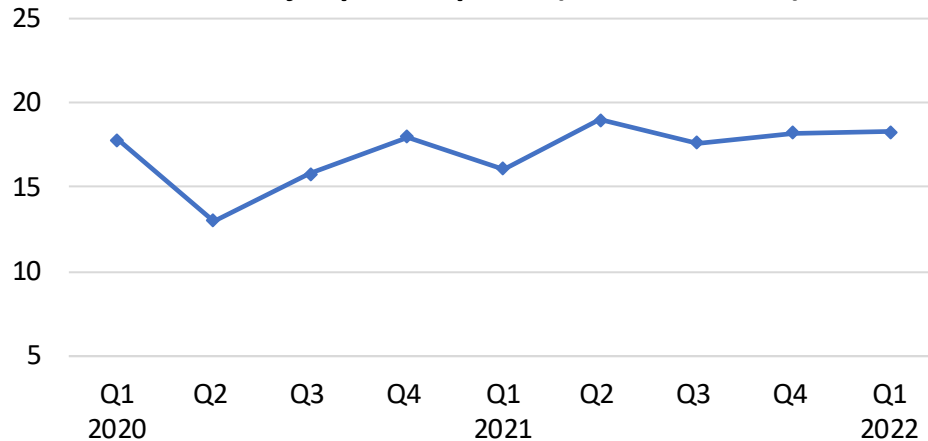
	2016	2017	2018	2019	2020
EU	2.8%	2.9%	2.7%	2.8%	2.9%
Non-EU	3.4%	3.2%	3.1%	3.0%	2.9%
<b>Total</b>	<b>3.1%</b>	<b>3.0%</b>	<b>2.9%</b>	<b>2.9%</b>	<b>2.9%</b>

Source: HMRC, Regional trade in goods

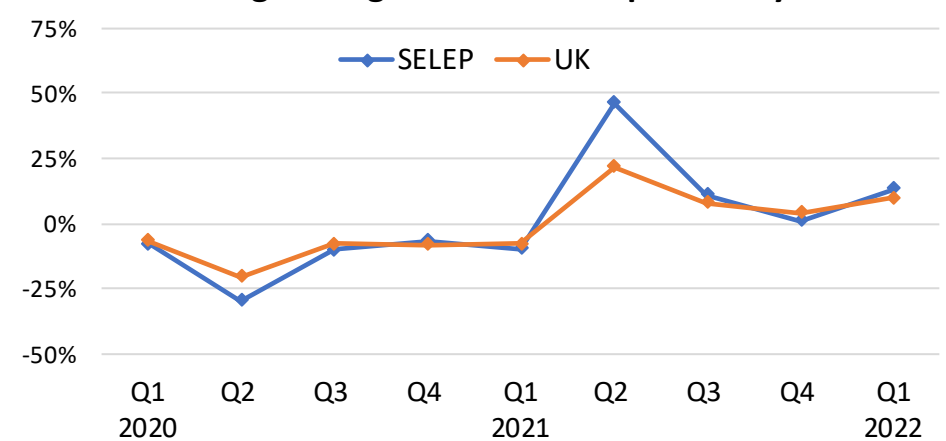
# Port Imports

- The SELEP area is host to five of the country's major ports, London, Dover, Medway, Harwich and Newhaven
- SELEP ports collectively handle a quarter of the UK's sea-borne import freight tonnage
- Import tonnage reduced significantly in quarter 2 of 2020 but then recovered
- A further fall in imports also occurred with lockdown 3 during quarter 1 of 2021
- Quarter 2 of 2021 saw strong recovery with import tonnage returning to pre-pandemic levels

**SELEP major port imports (million tonnes)**



**Percentage change on same time previous year**



	2020				2021				2022
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
SELEP	17.8	13.0	15.8	18.0	16.1	19.0	17.6	18.2	18.3
UK Share	24%	21%	24%	25%	24%	26%	24%	25%	25%

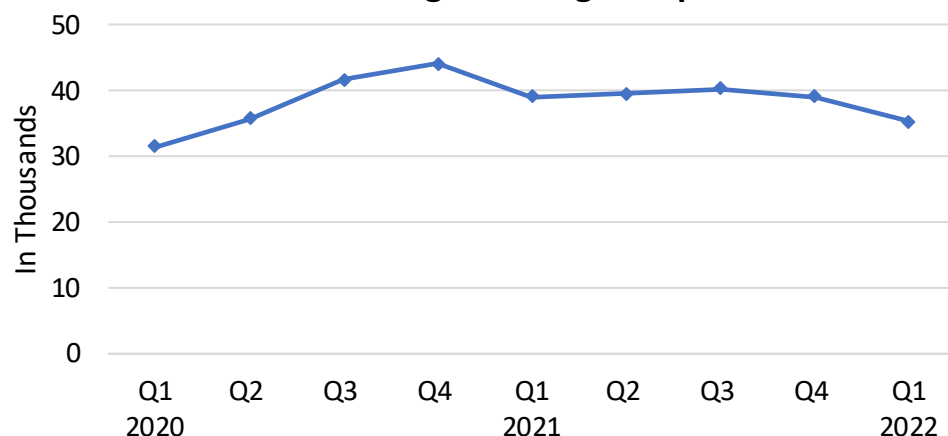
	2020				2021				2022
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
SELEP	-8%	-29%	-10%	-7%	-10%	46%	11%	1%	13%
UK	-7%	-20%	-8%	-8%	-8%	22%	8%	4%	10%

Source: DfT, Major Port Statistics, Table 502

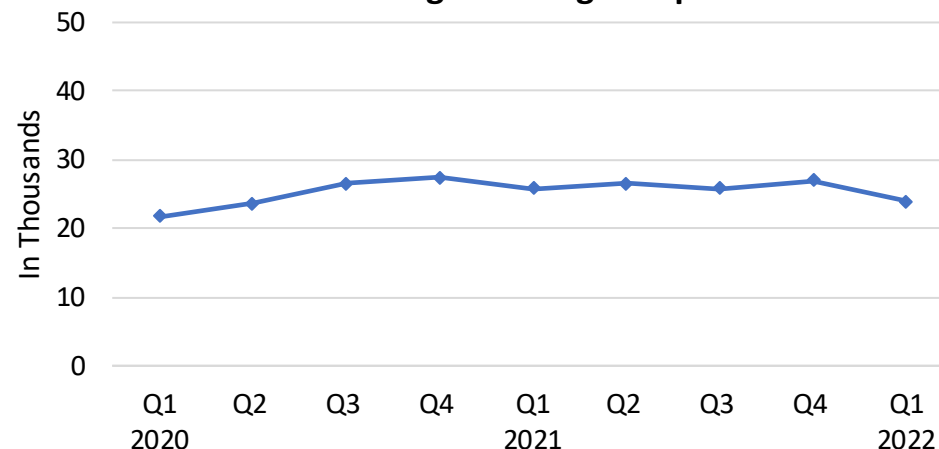
# Air Freight

- Stansted airport is the UK's third largest airport in terms of air freight handled
- During the pandemic, with reduced passenger numbers, Stansted took on a greater share of the country's air freight
- The share of both imports and exports has reduced slightly in recent quarterly figures
- However tonnage throughput remains high compared to 2019 levels
- In recent quarters, Southend airport has also begun to handle air freight

SELEP air-freight tonnage - Imports



SELEP air-freight tonnage - Exports



	2020				2021				2022
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
SELEP	31.5	35.8	41.7	44.1	39.1	39.6	40.3	39.1	35.4
UK Share	15%	19%	20%	17%	18%	18%	18%	16%	16%

	2020				2021				2022
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
SELEP	21.8	23.6	26.6	27.4	25.9	26.5	25.9	27.0	24.0
UK Share	12%	19%	17%	15%	16%	17%	17%	15%	15%

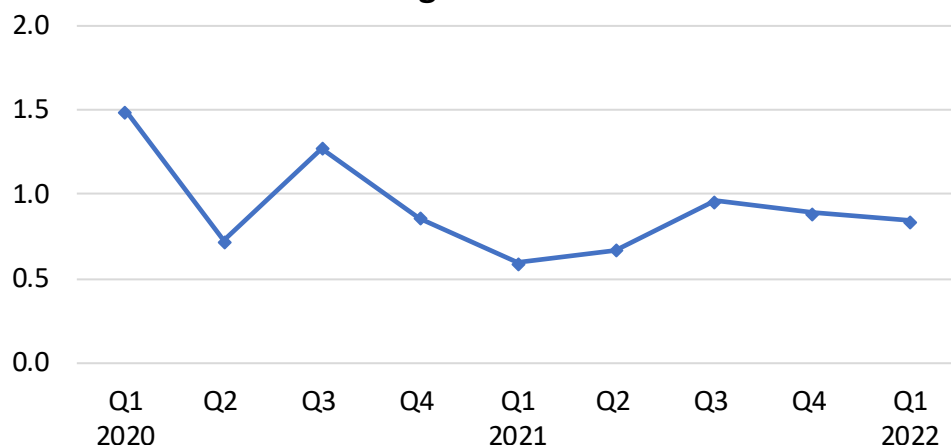
Source: CAA, Airport data, Table 13



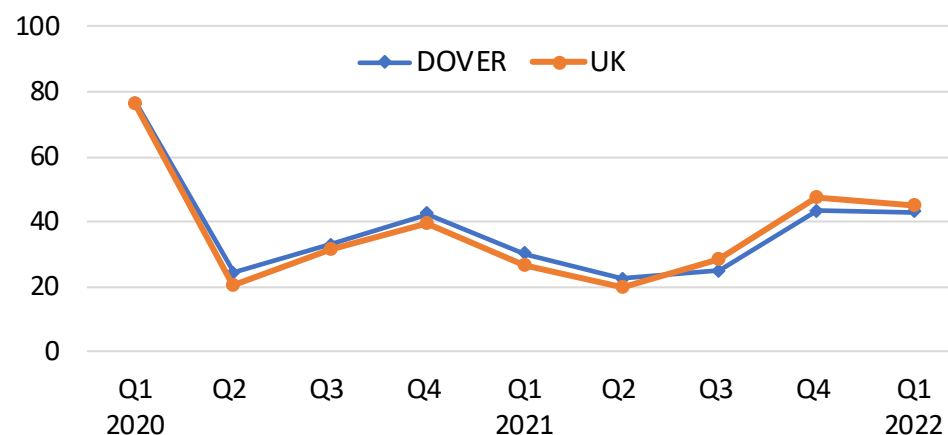
# Port Passengers

- Ports in the SELEP area provide for two thirds of the UK's short sea ferry passengers
- The port of Dover accounts for the majority of these passengers, with a 59% share of UK ferry passenger numbers
- Passenger numbers declined to less than a quarter of usual seasonal numbers in quarter 2 of 2020
- Although there was some recovery of numbers by late 2020, numbers declined again in 2021
- In the last quarter of 2021, passenger numbers were at 43.3% of the usual seasonal level

**Dover Passenger Numbers - millions**



**Passenger Index (2019=100)**



	2020				2021				2022
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
DOVER	1.49	0.72	1.27	0.86	0.59	0.67	0.96	0.89	0.84

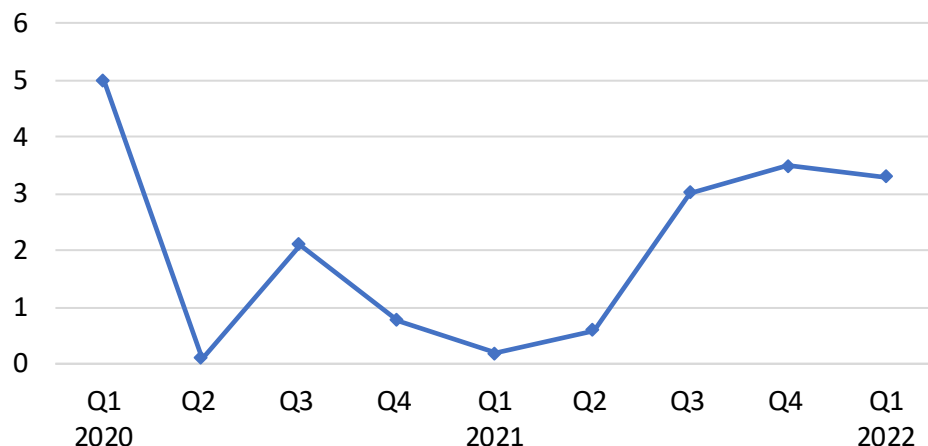
	2020				2021				2022
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
DOVER	76	24	33	42	30	22	25	43	43
UK	76	20	32	40	26	20	29	48	45

Source: Port of Dover

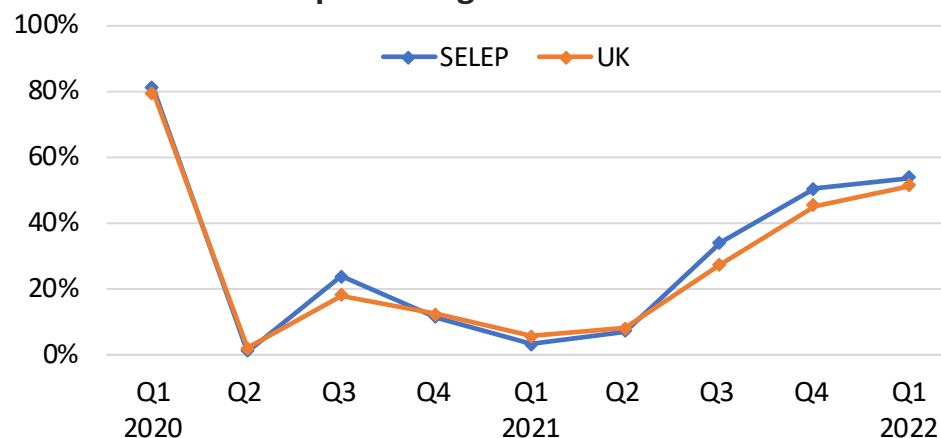
# Airport Passengers

- The SELEP area is host to two of the London Area International Airports – Stansted and Southend
- Airport passenger numbers reduced to near zero in quarter 2 of 2020 with some slight recovery in quarter 3
- Numbers remained at very low levels until quarter 3 of 2021
- Quarter 4, 2021 saw the highest number of passengers since the start of the pandemic with Quarter 1, 2022 seeing the highest as a percentage of 2019 levels

SELEP - in millions



As a percentage of 2019 numbers




	2020				2021				2022
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
SELEP	5.0	0.1	2.1	0.8	0.2	0.6	3.0	3.5	3.3
UK	48.1	1.4	16.0	8.2	3.4	6.3	24.4	30.4	31.0

	2020				2021				2022
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
SELEP	81%	1%	24%	11%	3%	7%	34%	50%	54%
UK	79%	2%	18%	12%	6%	8%	27%	45%	51%


Source: CAA, Airport data, Table 9



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