



SOUTH EAST
LOCAL ENTERPRISE
PARTNERSHIP

Key Indicators Report

UK's Global Gateway

September 2022

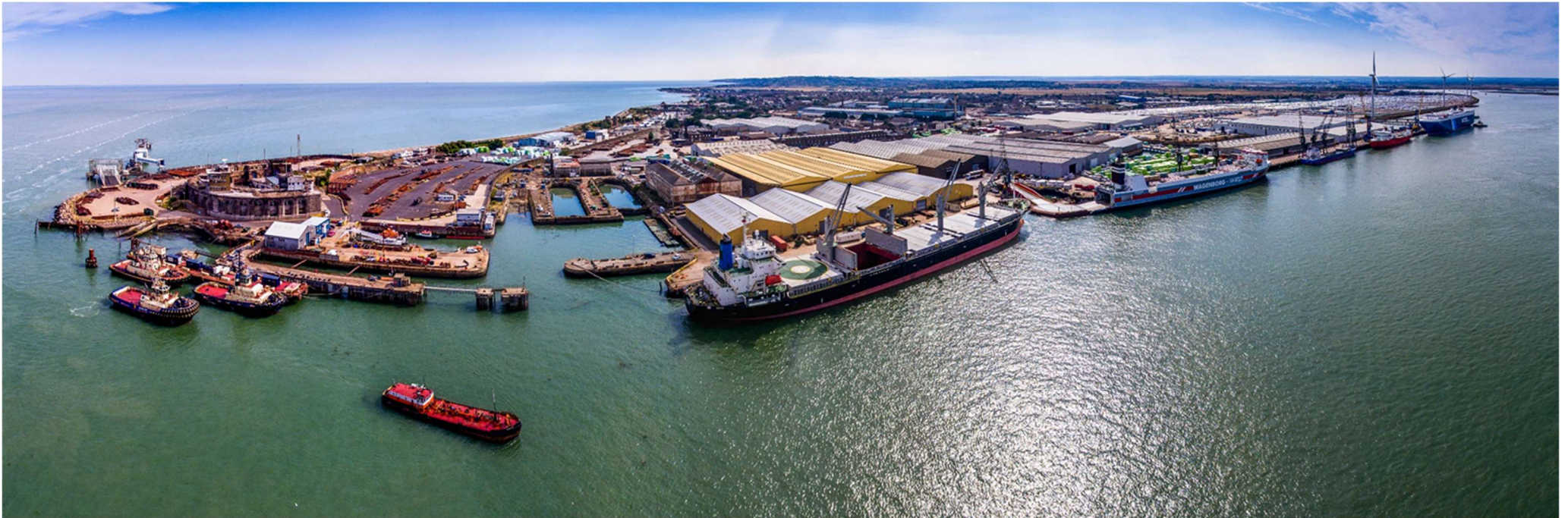
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Headline Summary

- SELEP's export value of goods was 18% down in 2020 compared to 2019, with Non-EU trade down more than EU trade and with Machinery and Transport equipment exports down most
- Import tonnage through SELEP ports remains high at 25% of the UK major port total, although throughput at Dover was low in quarter 2 of 2022
- Stansted continues to have a higher share of UK air-freight tonnage, having seen an increase in throughput during the pandemic, although throughput of exports has declined in recent quarters
- Port passenger numbers at Dover 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 and reached 80% of 2019 levels in quarter 2, 2022, with Stansted having recovered slightly more than UK airports overall

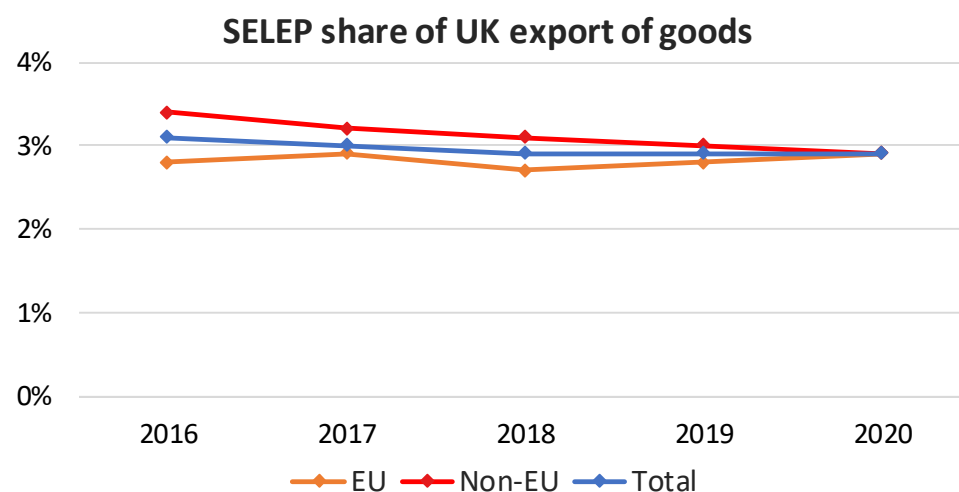


Export Value of Goods

- 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
Total	9,034	10,009	9,938	10,070	8,295



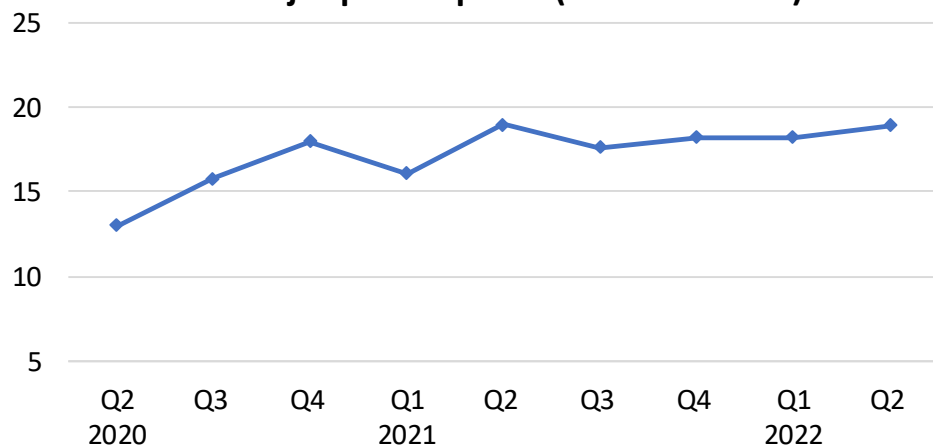
	2016	2017	2018	2019	2020
EU	2.8%	2.9%	2.7%	2.8%	2.9%
Non-EU	3.4%	3.2%	3.1%	3.0%	2.9%
Total	3.1%	3.0%	2.9%	2.9%	2.9%

Source: HMRC, Regional trade in goods

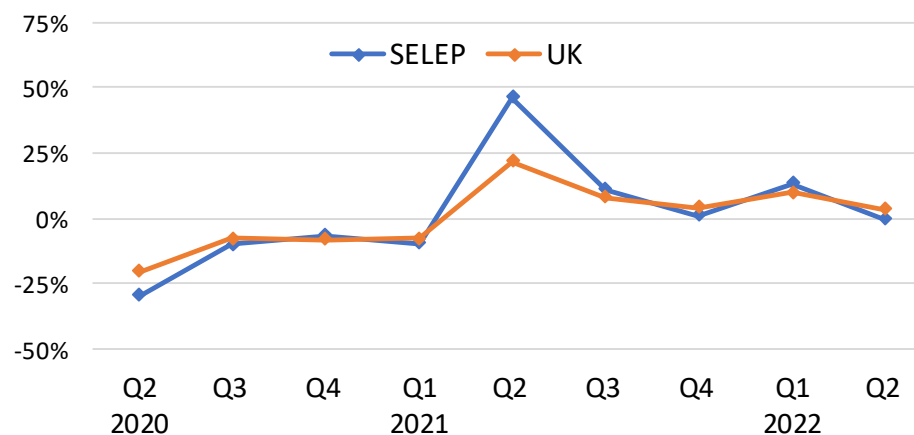
Port Imports

- 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 within lockdown periods during the pandemic
- Quarter 2 of 2021 saw strong recovery with import tonnage returning to pre-pandemic levels
- The most recent quarter saw high imports at London and Medway, but low imports for Dover

SELEP major port imports (million tonnes)



Percentage change on same time previous year



	2020			2021				2022	
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2
SELEP	13.0	15.8	18.0	16.1	19.0	17.6	18.2	18.2	18.9
UK Share	21%	24%	25%	24%	26%	24%	25%	25%	25%

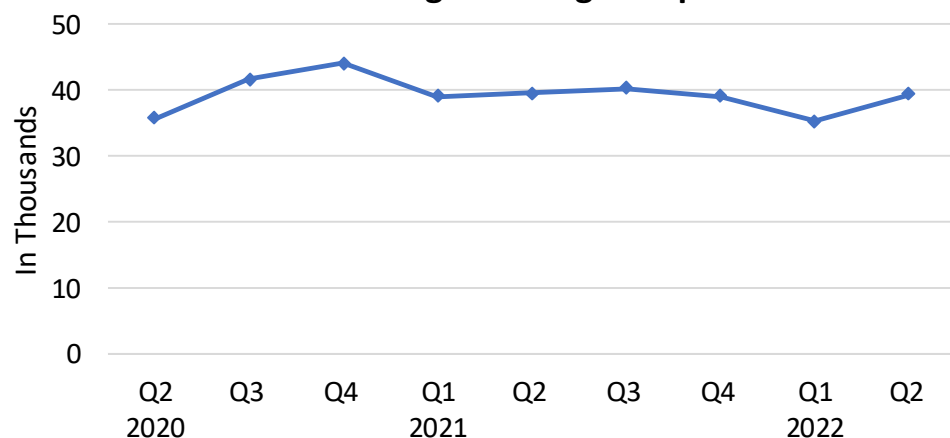
	2020			2021				2022	
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2
SELEP	-29%	-10%	-7%	-10%	46%	11%	1%	13%	-1%
UK	-20%	-8%	-8%	-8%	22%	8%	4%	10%	3%

Source: DfT, Major Port Statistics, Table 502

Air Freight

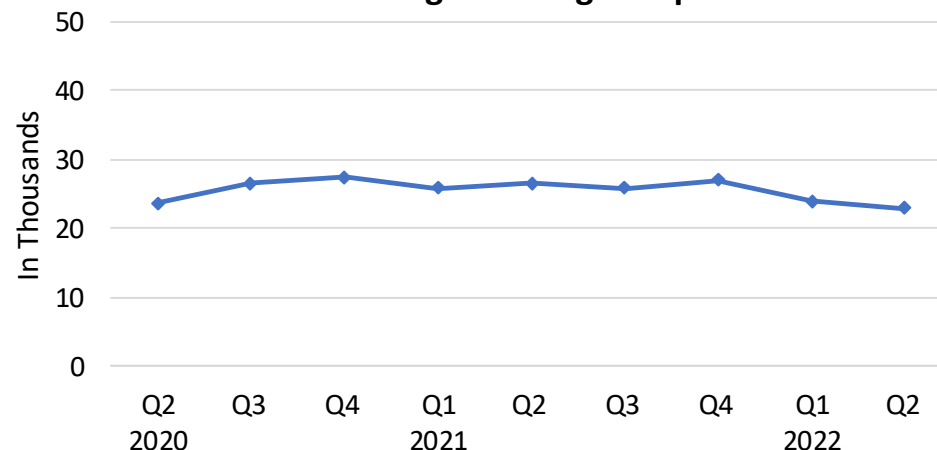
- Stansted airport is the UK's third largest airport in terms of air freight handled
- During the pandemic, with reduced passenger numbers, Stansted took on a greater share of the country's air freight
- The share of both national imports and exports has reduced slightly in recent quarterly figures
-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

SELEP air-freight tonnage - Imports



	2020			2021				2022	
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2
SELEP	35.8	41.7	44.1	39.1	39.6	40.3	39.1	35.4	39.5
UK Share	19%	20%	17%	18%	18%	18%	16%	16%	18%

SELEP air-freight tonnage - Exports



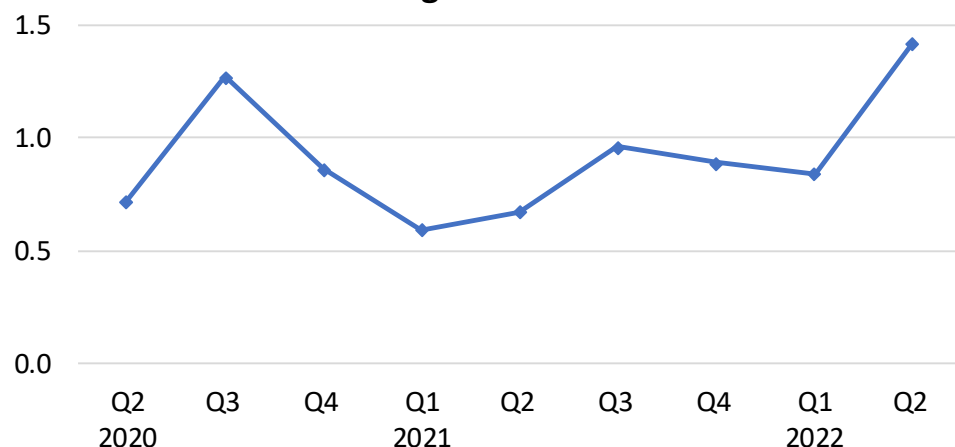
	2020			2021				2022	
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2
SELEP	23.6	26.6	27.4	25.9	26.5	25.9	27.0	24.0	23.0
UK Share	19%	17%	15%	16%	17%	17%	15%	15%	14%

Source: CAA, Airport data, Table 13

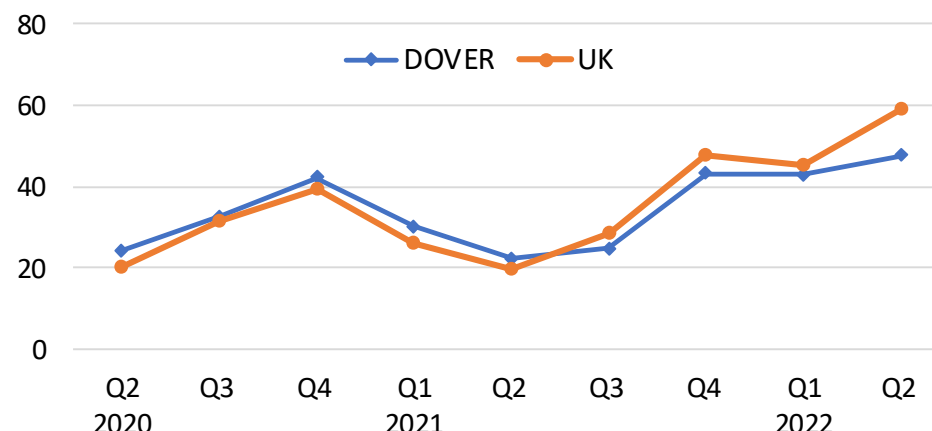
Port Passengers

- Ports in the SELEP area account 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 most recent quarter, passenger numbers still remained significantly below the usual seasonal level

Dover Passenger Numbers - millions



Passenger Index (2019=100)



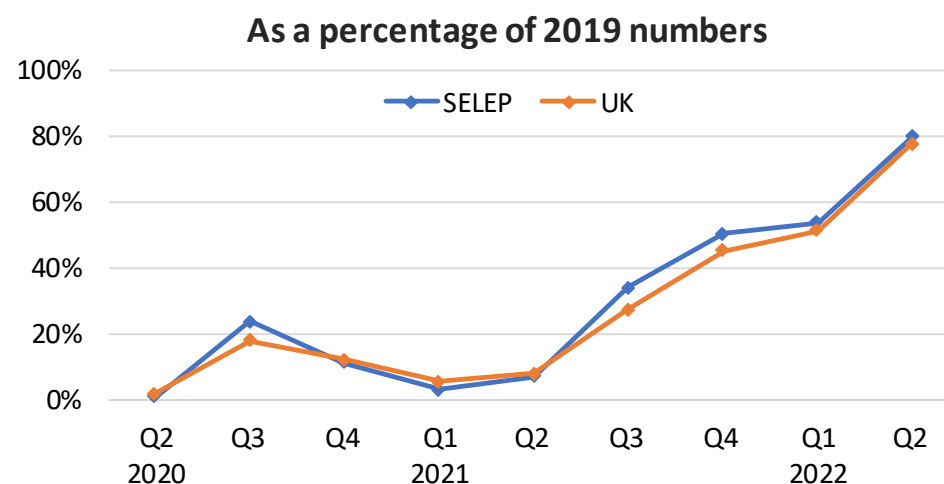
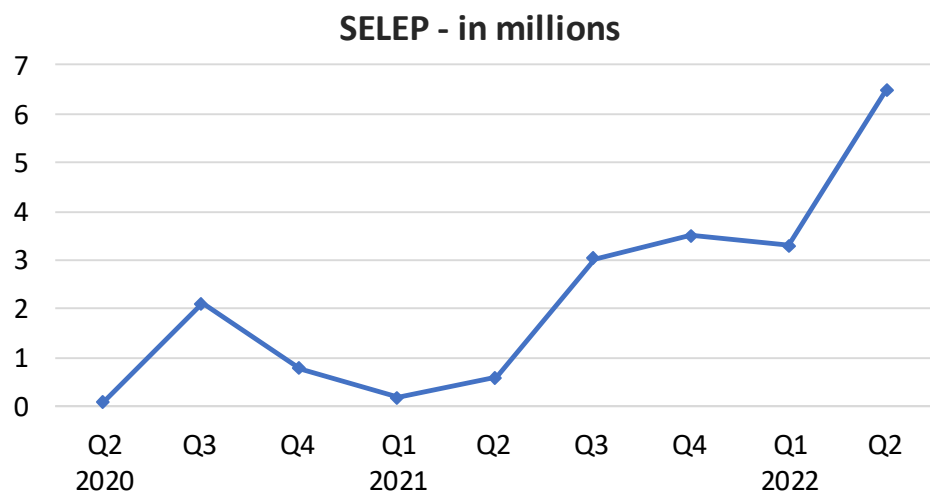
	2020			2021				2022	
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2
DOVER	0.72	1.27	0.86	0.59	0.67	0.96	0.89	0.84	1.42

	2020			2021				2022	
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2
DOVER	24	33	42	30	22	25	43	43	48
UK	20	32	40	26	20	29	48	45	59

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 2 of 2022 saw a significant recovery in airport passenger numbers, although they remained some 20% below the pre-pandemic level




	2020			2021				2022	
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2
SELEP	0.1	2.1	0.8	0.2	0.6	3.0	3.5	3.3	6.5
UK	1.4	16.0	8.2	3.4	6.3	24.4	30.4	31.0	61.9


	2020			2021				2022	
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2
SELEP	1%	24%	11%	3%	7%	34%	50%	54%	80%
UK	2%	18%	12%	6%	8%	27%	45%	51%	77%


Source: CAA, Airport data, Table 9



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